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- Set up your schedule to meet deadlines and stay on budget
- Keep all the members of the project team updated and informed
- Apply the project management tricks the professionals live by

Cynthia Snyder

Project 2016 For Dummies®

A Wiley Brand

by Cynthia Snyder

For Dummies®
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Project 2016 For Dummies®

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Contents at a Glance

Introduction 1

Part I: Getting Started with Project 2016 5

Chapter 1: Project Management, Project 2016, and You 7
Chapter 2: Starting the Project 19
Chapter 3: Becoming a Task Master 39
Chapter 4: The Codependent Nature of Tasks 53
Chapter 5: Estimating Task Time 65
Chapter 6: Check Out This View! 81

Part II: Managing Resources 101

Chapter 7: Creating Resources 103
Chapter 8: Working with Calendars 119
Chapter 9: Assigning Resources 133
Chapter 10: Determining a Project's Cost 145

Part III: Before You Baseline 155

Chapter 11: Fine-Tuning Your Plan 157
Chapter 12: Negotiating Project Constraints 171
Chapter 13: Making the Project Look Good 185
Chapter 14: It All Begins with a Baseline 201

Part IV: Staying on Track 211

Chapter 15: On the Right Track 213
Chapter 16: Project Views: Observing Progress 237
Chapter 17: You're Behind — Now What? 251
Chapter 18: Spreading the News: Reporting 267
Chapter 19: Getting Better All the Time 289

Part V: The Part of Tens 299

Chapter 20: Ten Golden Rules of Project Management 301
Chapter 21: Ten Cool Shortcuts in Project 2016 309

Appendix: Glossary 315

Index 325

Table of Contents

Introduction 1

About This Book 1
Foolish Assumptions 2
Icons Used in This Book 2
Beyond the Book 3
Where to Go from Here 3

Part I: Getting Started with Project 2016 5

Chapter 1: Project Management, Project 2016, and You 7

Introducing Project Management 7
    Defining project manager 8
    Identifying what a project manager does 9
    Introducing Project 2016 10
Getting to Know You 11
    Navigating file tabs and the Ribbon 14
    Displaying more tools 17
Tell Me What You Want to Do 18

Chapter 2: Starting the Project 19

Creating the Project Charter 20
Introducing the Work Breakdown Structure (WBS) 21
Organizing the Work 22
Starting the Project 24
    Entering project information 24
    Weighing manual scheduling versus automatic scheduling 26
    Entering the WBS 28
    Entering tasks 30
    Importing tasks from Outlook 32
    Promoting and demoting: The outdent-and-indent shuffle 35
Saving the Project 36

Chapter 3: Becoming a Task Master 39

Creating Summary Tasks and Subtasks 39
    How many levels can you go? 41
    The project summary task 41

Moving Tasks Up, Down, and All Around 43
    Moving tasks with the drag-and-drop method 44
    Moving tasks with the cut-and-paste (or copy-and-paste) method 44
Now You See It, Now You Don't: Collapsing and Expanding the Task Outline 45
Showing Up Again and Again: Recurring Tasks 48
Setting Milestones 49
Deleting Tasks and Using Inactive Tasks 50
Making a Task Note 51

Chapter 4: The Codependent Nature of Tasks. 53

How Tasks Become Dependent 54
    Dependent tasks: Which comes first? 54
    Dependency types 55
    Allowing for Murphy's Law: Lag and lead time 57
Setting the Dependency Connection 58
    Adding the dependency link 58
    Extending your reach with external dependencies 61
    Words to the wise 61
    Understanding that things change: Deleting dependencies 62

Chapter 5: Estimating Task Time 65

You're in It for the Duration 66
    Tasks come in all flavors: Identifying task types 66
    Effort-driven tasks: 1 + 1 = ½ 67
Estimating Effort and Duration 70
    Estimating techniques 70
    Setting the task duration 72
Controlling Timing with Constraints 73
    Understanding how constraints work 73
    Establishing constraints 74
    Setting a deadline 75
Starting and Pausing Tasks 76
    Entering the task's start date 77
    Taking a break: Splitting tasks 78

Chapter 6: Check Out This View! 81

A Project with a View 81
    Navigating tabs and views 82
    Scrolling around 84
    Reaching a specific spot in your plan 85

More Detail about Views 86
    Home base: Gantt Chart view 86
    Resourceful views: Resource Sheet and Team Planner 88
    Getting your timing down with the Timeline 88
    Going with the flow: Network Diagram view 89
    Calling up Calendar view 90
Customizing Views 91
    Working with view panes 92
    Modifying Network Diagram view 96
    Resetting the view 100

Part II: Managing Resources 101

Chapter 7: Creating Resources 103

Resources: People, Places, and Things 103
Becoming Resource-Full 104
    Understanding resources 104
    Resource types: Work, material, and cost 105
    How resources affect task timing 105
    Estimating resource requirements 106
The Birth of a Resource 107
    Creating one resource at a time 108
    Identifying resources before you know their names 109
    Many hands make light work 110
Managing Resource Availability 111
    Estimating and setting availability 111
    When a resource comes and goes 112
Sharing Resources 114
    Skimming from resource pools 114
    Importing resources from Outlook 116

Chapter 8: Working with Calendars 119

Mastering Base, Project, Resource, and Task Calendars 119
    How calendars work 120
    How one calendar relates to another 121
Scheduling with Calendar Options and Working Times 122
    Setting calendar options 122
    Setting exceptions to working times 124
Working with Task Calendars and Resource Calendars 126
    Setting resource calendars 126
    Making the change to a resource's calendar 127
Creating a Custom Calendar Template 129
Sharing Copies of Calendars 130

Chapter 9: Assigning Resources 133
Finding the Right Resource 133
Needed: One good resource willing to work 134
Custom fields: It's a skill 135
Making a Useful Assignation 136
Determining material and cost-resource units 137
Making assignments 137
Shaping the contour that's right for you 140
Benefitting from a Helpful Planner 142

Chapter 10: Determining a Project's Cost 145
How Do Costs Accrue? 146
Adding up the costs 146
When will this hit the bottom line? 147
Specifying Cost Information in the Project 148
You can't avoid fixed costs 148
Entering hourly, overtime, and cost-per-use rates 149
Assigning material resources 151
How Your Settings Affect Your Costs 152

Part III: Before You Baseline 155

Chapter 11: Fine-Tuning Your Plan 157
Everything Filters to the Bottom Line 157
Setting predesigned filters 158
Putting AutoFilter to work 159
Creating do-it-yourself filters 161
Gathering Information in Groups 163
Applying predefined groups 163
Devising your own groups 164
Figuring Out What's Driving the Project 166
Inspecting tasks 166
Handling task warnings and suggestions 167

Chapter 12: Negotiating Project Constraints. 171
It's about Time 171
Applying contingency reserve 172
Completing a task in less time 174
Getting What You Want for Less 176
The Resource Recourse 176
Checking resource availability 177
Deleting or modifying a resource assignment 178
Beating overallocations with quick-and-dirty rescheduling 179
Finding help 179
Leveling resources 180
Rescheduling the Project 183

Chapter 13: Making the Project Look Good 185
Looking Good! 185
Formatting the Gantt Chart 186
  Formatting taskbars 186
  Zeroing in on critical issues 189
  Restyling the Gantt chart 190
Formatting Task Boxes 191
Adjusting the Layout 192
Modifying Gridlines 195
Recognizing When a Picture Can Say It All 197
Creating a Custom Text Field 198

Chapter 14: It All Begins with a Baseline 201
All about Baselines 201
  Saving a baseline 202
  Saving more than one baseline 203
  Clearing and resetting a baseline 205
In the Interim 206
  Saving an interim plan 207
  Clearing and resetting an interim plan 208

Part IV: Staying on Track 211

Chapter 15: On the Right Track 213
Developing a Communications Management Plan 213
  Gathering data 214
  Applying a tracking method 215
  Using the tracking tools 216
  For everything, there's a view 217
Tracking Work for the Record 218
  Specifying the status date 219
  Remaining on track 220
  Determining the percent complete 220
  Recording start and finish information 222
  Knowing what to do when John works three hours and Mary works ten 222
  Uh-oh — we're in overtime 224
  Specifying remaining durations for auto-scheduled tasks 225
  Entering fixed-cost updates 227
Moving a Task 228
Update Project: Sweeping Changes 229
Tracking Materials 231
Tracking More Than One: Consolidated Projects 232
  Consolidating projects 232
  Updating consolidated projects 234
  Changing linking settings 235

Chapter 16: Project Views: Observing Progress. 237

Seeing Where Tasks Stand.........238
  Baseline versus actual progress 238
  Lines of progress.........239
Delving into the Detail.........242
Tracking Progress Using Earned Value Management 244
Calculating Behind the Scenes.........246
  Earned-value options.........247
  An abundance of critical paths 248

Chapter 17: You're Behind — Now What? 251

Using Project with Risk and Issue Logs 251
  Printing interim plans and baselines.........252
  Printing task notes.........253
What-If Scenarios.........254
  Sorting tasks 255
  Filtering 256
  Examining the critical path.........257
  Using resource leveling (again) 259
  Determining which factors are driving the timing of a task.........259
How Adding People or Time Affects the Project 260
  Hurrying up and making modifications.........260
  Throwing people at the problem 261
  Shifting dependencies and task timing 262
When All Else Fails 264
  Taking the time you need 264
  Finding ways to cut corners 265

Chapter 18: Spreading the News: Reporting. 267

Generating Standard Reports.........268
  What's available.........268
  Overviewing the dashboard reports 269
Creating New Reports 270
  Gaining a new perspective on data with visual reports.........271
  Creating a visual report 272
Fine-Tuning a Report.........273
  Dragging, dropping, and sizing 273
  Looking good!.........274
Spiffing Things Up.........276
Call the Printer!.........278
  Working with Page Setup 279
  Getting a preview.........283
  Printing, at last! 284

Working on the Timeline ... 285
    Adding tasks to the Timeline ... 285
    Customizing the Timeline ... 287
    Copying the Timeline ... 288
Enhanced Copy and Paste ... 288

Chapter 19: Getting Better All the Time ... 289

Reviewing the Project ... 289
    Learning from your mistakes ... 290
    Debriefing the team ... 291
Comparing Versions of a Project ... 292
Building on Success ... 294
    Creating a template ... 294
    Mastering the Organizer ... 296

Part V: The Part of Tens ... 299

Chapter 20: Ten Golden Rules of Project Management ... 301

Roll with It ... 301
Put Your Ducks in a Row ... 302
Expect the Unexpected ... 303
Don’t Put Off until Tomorrow 303
Delegate, Delegate, Delegate ... 304
Document It ... 305
Keep the Team in the Loop ... 305
Measure Success ... 306
Maintain a Flexible Strategy ... 306
Learn from Your Mistakes ... 307

Chapter 21: Ten Cool Shortcuts in Project 2016 ... 309

Task Information ... 309
Resource Information ... 310
Frequently Used Functions ... 310
Subtasks ... 311
Indenting and Outdenting ... 312
Fill Down ... 312
Navigation ... 312
Hours to Years ... 312
Timeline Shortcuts ... 313
Quick Find ... 313

Appendix: Glossary ... 315

Index ... 325

Introduction

Over the years, project management has evolved from a discipline that began with index cards and yarn to one that now uses sophisticated analyses, techniques, projections, reporting, and time and money tracking. Project management software brings functionality to project management that makes planning and tracking the complex projects we undertake a little more manageable.

About This Book

Microsoft Office Project 2016, the most recent incarnation of the world's most popular project management software, offers a tremendous wealth of functionality to users. In the beginning, however, as with most software, mastering it can seem like a daunting process. It helps to understand how Project's features relate to what you do every day as a project manager.

In *Project 2016 For Dummies,* my goal is to help you explore Project 2016, providing information on relevant project management concepts while also offering specific procedures to build and track a Project schedule. More important, I offer advice on how to make all these features and procedures mesh with what you already know as a project manager to ease the transition to using Project 2016.

Here are some broad topics that I help you explore in this book. You can

- Start out in Project 2016 by entering tasks and dependencies, estimating durations, and working with views
- Work with resources, calendars, and costs
- Negotiate constraints, fine-tune the schedule, and set a baseline
- Gather data, analyze progress, take corrective actions, and report project status

Within this book, you may note that some web addresses break across two lines of text. If you're reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it's noted in the text, pretending as though the line break doesn't exist. If you're reading this as an e-book, you've got it easy — just click the web address to be taken directly to the web page.

Foolish Assumptions

I've made some assumptions about you, gentle reader. I figure that you're computer-literate and that you know how to use the mouse, the keyboard, software menus, and toolbars. I assume that you know how to use most common Windows functions (such as the Clipboard), as well as many basic software functions, such as selecting text and dragging and dropping items with the mouse.

I also assume that you have experience in managing projects. Whether you manage very large projects that are several years long or you have been a team lead on a project, the information in this book is more accessible if you have a background in project management.

I do *not* assume that you've used Project or any other project management software. If you're new to Project, you'll find what you need to get up to speed, including information on how Project works, finding your way around the Project interface, and building your first Project plan. If you've used an earlier version of Project, you'll find out about Project 2016 and all the new features it provides.

Icons Used in This Book

One picture is worth . . . well, you know. That's why *For Dummies* books use icons to provide visual clues to what's going on. Essentially, icons call your attention to bits of special information that may well make your life easier. The following icons are used in this book.

REMEMBER

The Remember icon signals either a pertinent fact that relates to what you're reading at the time (but is also mentioned elsewhere in the book) or a reiteration of a particularly important piece of information that's, well, worth repeating.

TIP

Tips are the advice columns of computer books: They offer sage advice, a bit more information about topics under discussion that may be of interest, or ways to do things a bit more efficiently.

Warning icons spell trouble with a capital *T:* When you see a warning, read it. If you're not careful, you might do something at this point that could cause disaster.

Beyond the Book

In addition to the material in the print or e-book you're reading right now, this product also comes with some access-anywhere goodies on the web:

- **Cheat Sheet:** The cheat sheet has lots of shortcuts and other nifty tips and tricks. You can find the Cheat Sheet at `www.dummies.com/cheatsheet/project2016`.
- **Web Extras:** There is a web extra for every part in this book. Just follow the link to the Web Extras at `www.dummies.com/extras/project2016`.
- **Companion website:** This book is accompanied by a companion website that includes a project charter example and template, as well as several sample forms to help you plan and manage the schedule. To access this additional material, point your web browser to `www.dummies.com/go/project2016fd`.

Where to Go from Here

Take what you've learned in the project management school of hard knocks and jump into the world of Project 2016. When you do, you'll be rewarded with a wealth of tools and information that help you manage your projects much more efficiently.

Your first step might be to read the table of contents and find the sections of this book that you need — or simply turn to Chapter 1 and start reading.

Part I

Getting Started with Project 2016

getting started
with
Project
2016

For Dummies can help you get started with lots of subjects. Visit `www.dummies.com` for more great content online.

In this part . . .

- ✓ Get familiar with the Ribbons and file tabs in Project 2016.
- ✓ See how to open a new project, enter tasks, and organize a project.
- ✓ Become skilled in working with summary tasks, milestones, and notes.
- ✓ Identify and arrange task dependencies to create a network diagram.
- ✓ Develop duration estimates for tasks.
- ✓ Customize Project views to meet your needs.

Chapter 1

Project Management, Project 2016, and You

In This Chapter

- Understanding the elements of a project
- Laying out the project manager's role
- Benefitting from Project 2016
- Exploring the software interface
- Finding help in Project

Welcome to the world of computerized project management with Microsoft Project. If you've never used project management software, you're entering a brave new world.

Everything you used to do with handwritten to-do lists, word processors, and spreadsheets magically comes together in Project. However, this transition doesn't come in a moment, and you need a basic understanding of what project management software can do to get you up to speed. If you've used previous versions of Project, the overview in this chapter can refresh your memory and ease you into a few of the new Project 2016 features.

Even if you're a seasoned project manager, this chapter provides the foundation for how to work with Project.

Introducing Project Management

You probably handle projects day in and day out. Some are obvious, because your boss named them so that any fool would know that they're projects: Acme Drilling Project or Network Expansion IT Project, for example.

Others are less obvious, such as that presentation you need to put together for your director or that how-to guide on planting a vegetable garden in your backyard.

In this book, a project is defined as a unique venture undertaken to produce distinct deliverables, products, or outcomes. In the context of a project, a *deliverable* is a discrete component or item that meets the requirements of the project, such as a design document or a prototype. Projects have multiple variables; some are straightforward to define, and others aren't.

Using the information about variables in Table 1-1, you can say that *project management* is the practice of organizing, managing, and controlling project variables to meet the project outcomes and mission.

Table 1-1 Project Variables

Variable	***Description***
Defined	
Scope	The work needed to produce the deliverables, products, or outcomes for the project.
Time	The duration required to complete the project work.
Cost	The funds required to complete the project.
Resources	The people, equipment, material, supplies, and facilities needed to accomplish the project.
Undefined	
Change	The type, timing, number, and degree of modifications from a project baseline; can affect the project's scope, time, cost, or resources.
Risk	Uncertainty (associated with the scope, time, cost, resources, stakeholders, or environment) that can threaten the completion of any aspect of the project. Fortunately, risks can also present opportunities to accelerate the schedule or come in under budget.
Stakeholder	A person who can affect, or who is affected by, the project, either positively or negatively.
Environment	The location, culture, or organization in which the project occurs.

Defining project manager

Although understanding the role (let alone the usefulness) of certain managers isn't always easy, you can easily spot the value of a *project manager:*

This person creates the master plan for a project and ensures that it is implemented successfully. Along the way, the project manager uses technical, business, and professional skills to manage the completion of tasks and keep the schedule on track.

A truly professional project manager may have a degree in project management or a professional certification. For example, if you see the initials *PMP* beside a name, that person has been certified as a project management professional by the Project Management Institute, the leading global organization establishing project management standards and credentials, and offering educational and other types of resources in the field.

Identifying what a project manager does

A project manager isn't always the highest authority in a project. Often, that role belongs to whoever manages the project manager — including, possibly, members of senior management. Rather, the project manager is the person who ensures that aspects of the project are integrated and assumes hands-on responsibility for successes as well as failures.

In project management parlance, the person who champions (and funds) a project is the *project sponsor.* Although the project manager may work for the project sponsor, the project often also has a *customer* — outside the project manager's own company or within it — for whom the end product is produced.

The project manager manages these essential pieces of a project:

- **Scope:** Define and organize all work that needs to be done in order to meet the project mission and create deliverables.
- **Schedule:** This element, which you create by working with Project, includes the estimated steps and associated timing involved in reaching the project goal.
- **Resources:** Assign resources and track their activities on the project as well as resolve resource conflicts and build consensus. This part of the job also involves managing nonhuman resources such as materials and equipment.
- **Cost:** Estimate project costs and apply those estimates across the schedule to create a time-phased budget.
- **Communication:** Notify appropriate *stakeholders* (everyone who has a legitimate stake in its success) of the project status.

Creating a logical balance of the defined variables of scope, time, cost, and resources is at the core of a good project manager's job throughout the life of a project. Managing a project requires overseeing all its variables to ensure that the project goals are accomplished on time, within the limits of the budget, and using the assigned resources while also addressing risks, managing change, and satisfying stakeholders. Sound easy? Maybe not. However, one thing is certain: Having software to help organize and structure the work makes managing the project less daunting. That's where Project 2016 can help.

Introducing Project 2016

Project 2016, which is a scheduling tool, helps you organize, manage, and control defined variables, as identified in the preceding section. Project can also help you manage the undefined variables as well. In this book, I show you how to use Project to organize and manage your work, create realistic schedules, and optimize your use of resources.

Take a moment to look at some of the wonderful ways in which Project can help you organize, manage, and control your project. Now that you have, or your company has, bought Project (and this book) and you're investing your time to understand how to use it, you can enjoy these benefits:

- **Use built-in templates to get a head start on your project.** Project *templates* are prebuilt plans for a typical business project, such as commercial construction, an engineering project, a new product rollout, software development, or an office move.
- **Organize your project by phase, deliverable, geography, or any other method.** The outline format allows you to progressively elaborate the information in greater granularity depending on how detailed you want your plan to be.
- **Determine costs by your chosen method.** Examples are time period, resource type, deliverable, or cost type.
- **Organize resources by resource type.** Level your resources to avoid overallocation, or determine the impact on the duration of a task based on a change in resources.
- **Calculate costs and timing based on your input.** You can quickly calculate what-if scenarios to solve resource conflicts, maintain costs within your budget, or meet a deliverable deadline.

- **Use views and reports with the click of a button.** A wealth of information is now available to you — and those you report to. You no longer have to manually build a report on total costs to date to meet a last-minute request from your boss.
- **Manage complex algorithms** (that you couldn't even begin to figure out on your own) to complete such tasks as leveling resource assignments to solve resource conflicts, filtering tasks by various criteria, modeling what-if scenarios, and calculating the dollar value of work performed to date.

No matter how cool the tool, you have to take the time to enter meaningful data. Great software doesn't ensure great outcomes; it only makes them easier to achieve.

Getting to Know You

The file you create in Project is a Project *schedule model.* It's a model because it models what you think will happen given what you know at the time. However, for ease of reference, I just refer to it as a schedule. The schedule has a plethora of data about various aspects of your project as well as graphical representations of that information.

Some people refer to the project schedule as the project plan. In reality, the project plan *contains* the project schedule — plus information such as the budget, work breakdown structure, project life cycle, risk management plan, and many other ingredients necessary to effectively manage a project.

When you first open Project 2016, you see several options for starting a new project, as shown in Figure 1-1.

You can open a blank project, create a new project from an existing project, or create a new project by importing information from Microsoft Excel or SharePoint. You can also take advantage of premade templates for common project types, such as these examples:

- Agile project management
- Software development
- New product launch
- Residential construction

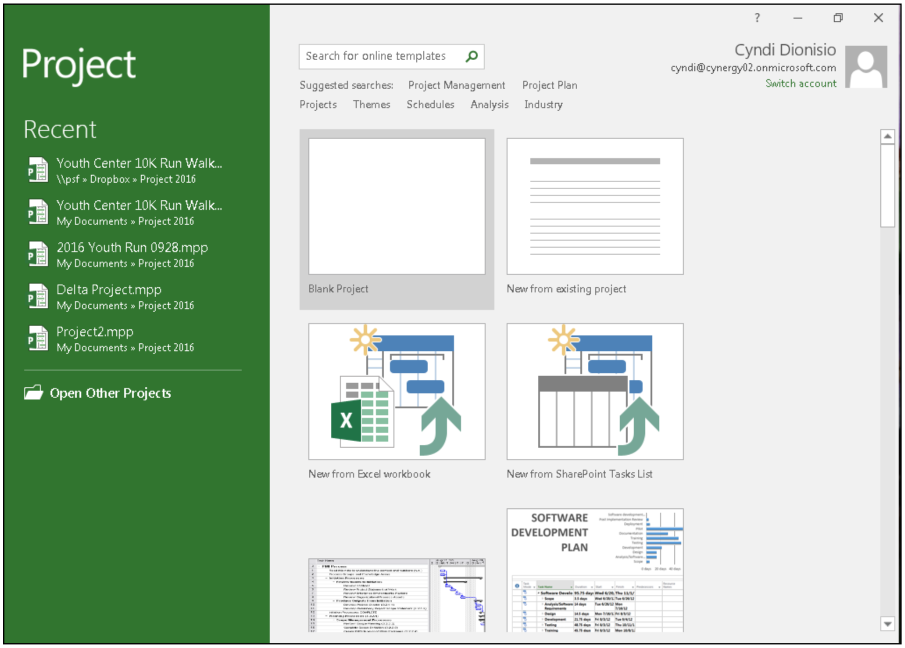

Project
Recent
Youth Center 10K Run Walk...
\\psf » Dropbox » Project 2016
Youth Center 10K Run Walk...
My Documents » Project 2016
2016 Youth Run 0928.mpp
My Documents » Project 2016
Delta Project.mpp
My Documents » Project 2016
Project2.mpp
My Documents » Project 2016
Open Other Projects
Search for online templates
Suggested searches: Project Management Project Plan
Projects Themes Schedules Analysis Industry
Cyndi Dionisio
cyndi@cynergy02.onmicrosoft.com
Switch account
Blank Project
New from existing project
New from Excel workbook
New from SharePoint Tasks List
SOFTWARE DEVELOPMENT PLAN

Figure 1-1: What you see when you open Project 2016.

If you don't see the template you need, you can search for online templates by entering keywords in the search box at the top of the page. For purposes of this discussion, I assume that you're starting with a new, blank project.

When you open a new project, you see the Quick Access toolbar, a few file tabs, the Ribbon, the Timeline, a pane with a sheet and a chart, and the status bar, as shown in Figure 1-2.

In Figure 1-2, you see Gantt Chart view. (I discuss views in Chapter 6.) For now, here's an overview of the major elements in Project (refer to Figure 1-2):

- **Quick Access toolbar:** The Quick Access toolbar, above and to the left of the Ribbon, is onscreen at all times and in all views.
- **File tab:** The file tabs organize commands based on a particular type of activity. For example, if you're working with resources, you'll likely find the command or setting you want on the Resource tab.
- **Ribbon:** The Ribbon provides easy access to the most commonly used tools and commands. When you change tabs, the available tools on the Ribbon change.
- **Group:** A *group* is a set of related commands or choices on the Ribbon. For example, to format text in a cell on the sheet, first find the formatting information you need in the Font group on the Task tab of the Ribbon.

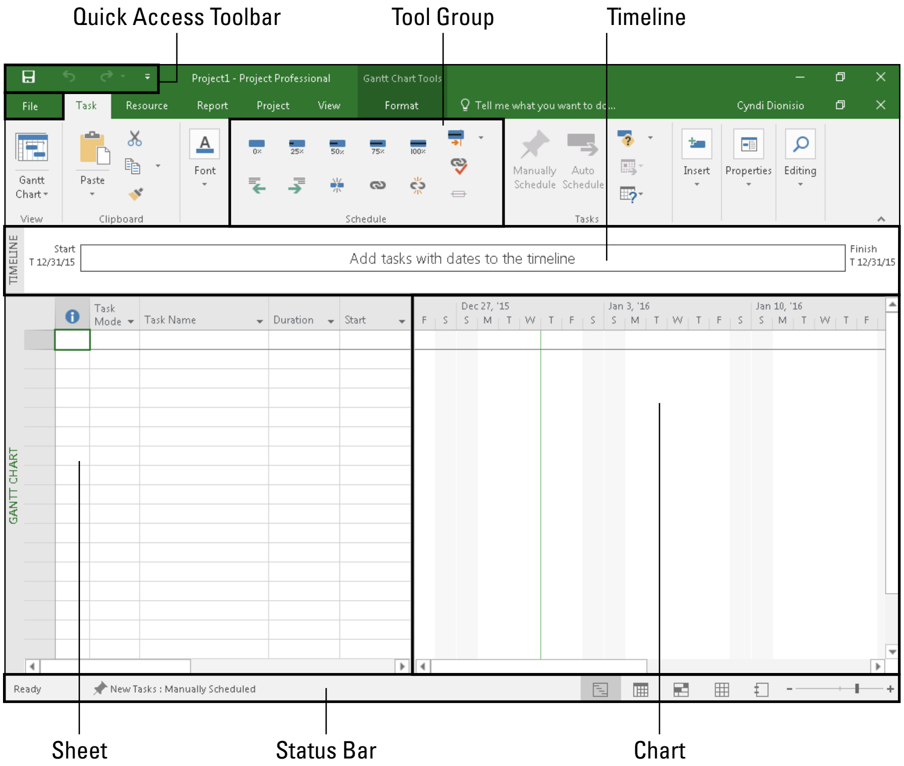

Quick Access Toolbar
Tool Group
Timeline
Project1 - Project Professional
Gantt Chart Tools
File
Task
Resource
Report
Project
View
Format
Tell me what you want to do...
Cyndi Dionisio
Gantt Chart
Paste
Font
Manually Schedule
Auto Schedule
Insert
Properties
Editing
View
Clipboard
Schedule
Tasks
TIMELINE
Start T 12/31/15
Add tasks with dates to the timeline
Finish T 12/31/15
GANTT CHART
Task Mode
Task Name
Duration
Start
Dec 27, '15
Jan 3, '16
Jan 10, '16
Ready
New Tasks : Manually Scheduled
Sheet
Status Bar
Chart

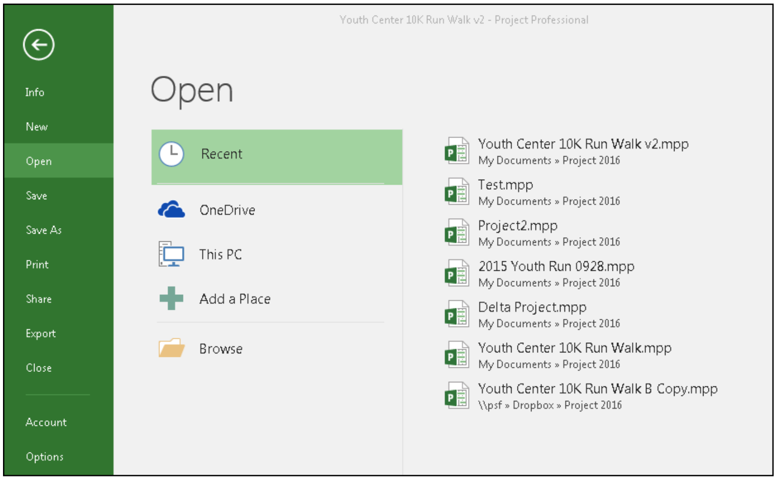
Figure 1-2: A blank project.

- **Timeline:** The Timeline provides an overview of the entire project — a graphical view of the project from start to finish. You have the option of showing the Timeline or hiding it.
- **Sheet:** Similar to a spreadsheet, the sheet displays the data in the project. The default fields change depending on the file tab you're working in. You can customize the columns and fields in the sheet to meet your needs.
- **Chart:** The *chart* is a graphical depiction of the information on the sheet. Depending on the view or file tab you see, you might also see a bar chart depicting the duration of a task or a resource histogram showing resource usage.
- **Status bar:** The status bar, at the bottom of the Project window, has information on views and zoom level on the right, and information on how newly entered tasks are scheduled on the left.

Navigating file tabs and the Ribbon

Each of the seven file tabs in Project shows different options on the Ribbon. In this section, I provide an overview of each file tab and of the Ribbon and the Quick Access toolbar. I elaborate on various functions and commands on the Ribbon in later chapters.

The first tab on the left, the File tab, stands out in bright green. After you click this tab, you see the menu bar down the left side, as shown in Figure 1-3.


Youth Center 10K Run Walk v2 - Project Professional
Info
New
Open
Save
Save As
Print
Share
Export
Close
Account
Options
Open
Recent
OneDrive
This PC
Add a Place
Browse

Youth Center 10K Run Walk v2.mpp
My Documents » Project 2016

Test.mpp
My Documents » Project 2016

Project2.mpp
My Documents » Project 2016

2015 Youth Run 0928.mpp
My Documents » Project 2016

Delta Project.mpp
My Documents » Project 2016

Youth Center 10K Run Walk.mpp
My Documents » Project 2016

Youth Center 10K Run Walk B Copy.mpp
\\psf » Dropbox » Project 2016

Figure 1-3: The File tab menu.

The File tab puts you into Backstage view, where you find choices for working with files and changing options. For example, you can create a new project, open an existing project, save your current project, or print your current project. From Backstage view, you can also share, export, or close your current project. If you're feeling adventurous, you can even customize the Ribbon and the Quick Access toolbar.

The Task file tab is where you spend a lot of your time in Project. As you can see in Figure 1-4, on the far left side of the Task file tab is the View. The default view is Gantt Chart view. It shows the task information and the chart that displays a bar chart representing the duration of each task.

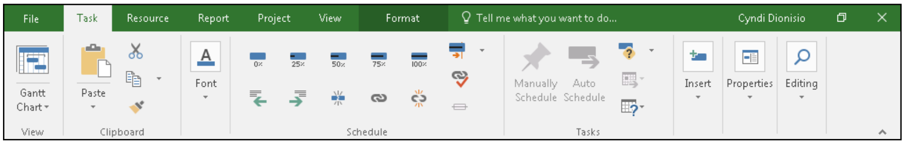

File
Task
Resource
Report
Project
View
Format
Tell me what you want to do...
Cyndi Dionisio
Gantt Chart
View
Paste
Clipboard
Font
0%
25%
50%
75%
100%
Schedule
Manually Schedule
Auto Schedule
Tasks
Insert
Properties
Editing

Figure 1-4: The Task file tab.

In addition to Gantt Chart, you can choose these views:

Calendar
Resource Sheet
Resource Form
Task Usage
Task Sheet
Timeline
Network Diagram
Resource Usage
Resource Graph
Task Form
Team Planner
Tracking Gantt

You may recognize some of the groups of commands on the Task file tab. For example, the Clipboard and Font groups are standard in many Windows applications. Other groups, such as Schedule and Tasks, are specific to a particular view — in this case, Gantt Chart view. Look for the deep green Gantt Chart Tools Format tab when you see the Task file tab in Gantt Chart view. In other views, you see different tools above the Format tab.

The Resource file tab, shown in Figure 1-5, helps you organize resources, such as adding, assigning, and leveling resources across tasks. In Project, resources include people, equipment, material, locations, and supplies. You can assign costs and calendars to resources. (I talk more about resources in Chapter 7.)

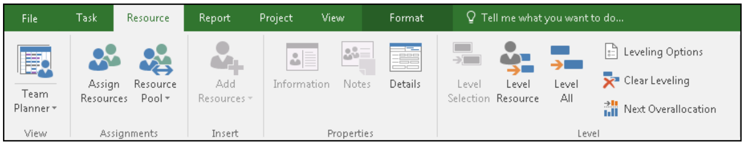

File
Task
Resource
Report
Project
View
Format
Tell me what you want to do...
Team Planner
Assign Resources
Resource Pool
Add Resources
Information
Notes
Details
Level Selection
Level Resource
Level All
Leveling Options
Clear Leveling
Next Overallocation
View
Assignments
Insert
Properties
Level

Figure 1-5: The Resource file tab.

The Report file tab, shown in Figure 1-6, is new in Project 2016. You can create reports on resources, costs, or progress, or put them all together in a dashboard report. You can create a report that compares your current status to previous versions of your project. I tell you all about reports, including how to customize and export your reports, in Chapter 18.

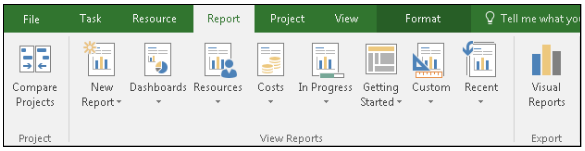

File
Task
Resource
Report
Project
View
Format
Tell me what yo
Compare Projects
New Report
Dashboards
Resources
Costs
In Progress
Getting Started
Custom
Recent
Visual Reports
Project
View Reports
Export

Figure 1-6: The Report file tab.

On the Project file tab, you find commands to help you manage your project as a whole, rather than by task or resource. For example, you can enter or change the project start and finish dates and the baseline. If you need to change working time or add a subproject, this is the place to do it. Figure 1-7 shows the Project file tab.

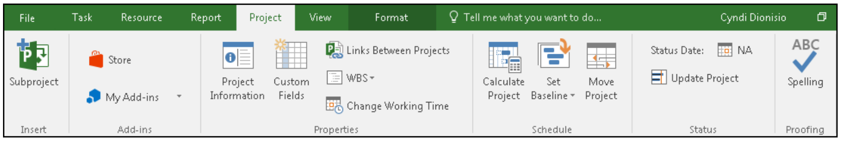

File
Task
Resource
Report
Project
View
Format
Tell me what you want to do...
Cyndi Dionisio
Subproject
Insert
Store
My Add-ins
Add-ins
Project Information
Custom Fields
Links Between Projects
WBS
Change Working Time
Properties
Calculate Project
Set Baseline
Move Project
Schedule
Status Date:
NA
Update Project
Status
ABC
Spelling
Proofing

Figure 1-7: The Project file tab.

The View file tab lets you see some standard views. Examples are Task views, such as Gantt Chart, and Resource views, such as Resource Usage or Team Planner. You can use the View file tab to look at information sorted by date or a specific period. You can see the View file tab in Figure 1-8.

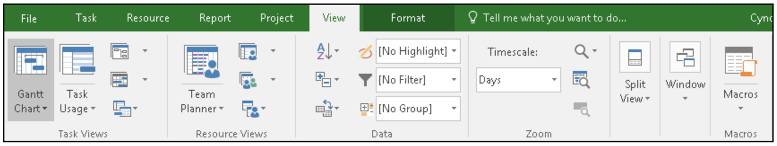

File
Task
Resource
Report
Project
View
Format
Tell me what you want to do...
Gantt Chart
Task Usage
Task Views
Team Planner
Resource Views
[No Highlight]
[No Filter]
[No Group]
Data
Timescale:
Days
Zoom
Split View
Window
Macros
Macros

Figure 1-8: The View file tab.

The Format file tab has commands that help you present your schedule, such as font styles, page breaks, and column settings. You can see the options in Figure 1-9.

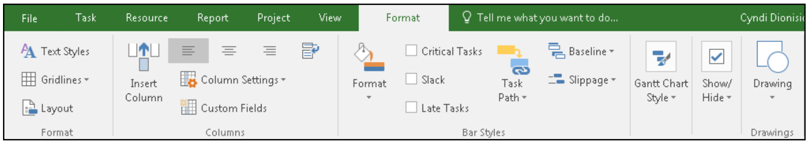

File
Task
Resource
Report
Project
View
Format
Tell me what you want to do...
Cyndi Dionisi
Text Styles
Gridlines
Layout
Format
Insert Column
Column Settings
Custom Fields
Columns
Format
Critical Tasks
Slack
Late Tasks
Task Path
Baseline
Slippage
Bar Styles
Gantt Chart Style
Show/ Hide
Drawing
Drawings

Figure 1-9: The Format file tab.

TIP

You can either show or hide the Ribbon to produce more real estate on your screen. The pushpin to the far right of the Ribbon pins it to your display, keeping it open and visible (as shown in Figure 1-10). The upward-facing arrow (^) on the far-right side hides the Ribbon. If your Ribbon is closed, click on any tab, look in the lower-right corner of the Ribbon and you will see a pushpin. Click on the pushpin to keep your Ribbon open. You can also press Ctrl+F1 to show or hide the Ribbon.