

WELCOME! GET READY:

1. Open up Microsoft Project
2. In a browser, navigate to: bit.ly/txstproject



The rising STAR of Texas

INTRODUCTION TO MS PROJECT



The rising STAR of Texas

Texas State University Library Staff Professional Development

May 3, 2019

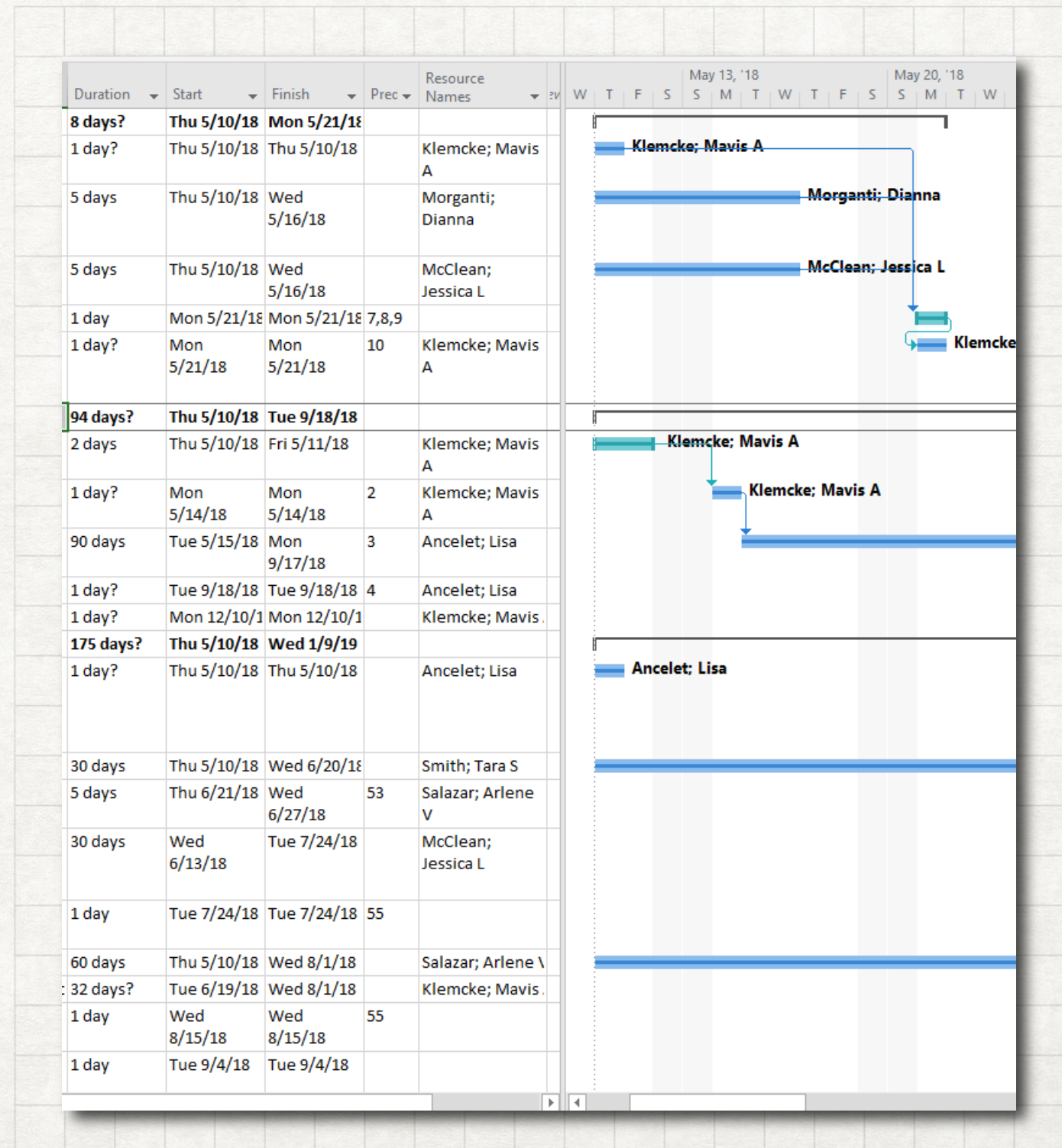
MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

AGENDA

- Overview of MS Project
 - How to download software
- Creating a new project
- Customizing your project attributes
- Inputting tasks, creating summary tasks, and identifying milestones
- Show and tell of various features

MICROSOFT PROJECT OVERVIEW

- Documenting a plan and Scheduling a project
- Shared team/project calendar
- GANTT visualization
- Progress tracking/reporting
- Integration with SharePoint, Outlook Tasks, notifications, and more



DOWNLOADING MS PROJECT

SOFTWARE CENTER

Available Software

Installation Status

Installed Software

Options

SHOW

All

☒ Show optional software Find

<input type="checkbox"/> NAME	TYPE	PUBLISHER	AVAILABLE AFTER	STATUS
<input type="checkbox"/> Adobe Acrobat Reader DC	Application		3/11/2019	Available
<input type="checkbox"/> Adobe DC Update 1901020099	Application		4/26/2019	Past due - will be retried
<input type="checkbox"/> Adobe Reader DC Update 1901020099	Application		4/26/2019	Available
<input type="checkbox"/> Adobe Shockwave Player 12.3.4.204	Application		6/29/2018	Available
<input type="checkbox"/> BDMS AX 16.3	Application		11/1/2018	Available
<input type="checkbox"/> CrashPlan v6.8.7	Application	Code42 Software, Inc.	4/30/2019	Available
<input type="checkbox"/> Display Fusion v7.1	Application	Display Fusion	10/19/2016	Available
<input type="checkbox"/> HyperSnap 7.23				lable
<input type="checkbox"/> Internet Explorer 11 - does not force restart but REQUIRES IT				lable
<input type="checkbox"/> JMP Pro 13 License Renewal 2019-2020 13 - JMP Pro 13 License Renewal				lable
<input type="checkbox"/> JMP Pro 14 License Renewal 2019-2020 14 - JMP Pro 14 License Renewal				lable
<input type="checkbox"/> JMP Pro v14				lable
<input type="checkbox"/> Microsoft Office 365 ProPlus - Restart required				lable
<input type="checkbox"/> Microsoft Office Project 2016 32bit				lable
<input type="checkbox"/> Microsoft Office Visio 2016 32bit				lable
<input type="checkbox"/> Microsoft Project - for use with Office 365 ProPlus				lable
<input type="checkbox"/> SAP Business Client 6.5 PL8				lable
<input type="checkbox"/> VLC Media Player - 3.0.6				lable

★

Microsoft Project - for use with Office 365 ProPlus

Microsoft Office 365 ProPlus - Restart required

Microsoft Office Project 2016 32bit

Microsoft Office Visio 2016 32bit

Microsoft Project - for use with Office 365 ProPlus

SAP Business Client 6.5 PL8

VLC Media Player - 3.0.6

Display Fusion v7.1

OVERVIEW

Status: Available

Version: 7.1

Date published: Not specified

Help document: None

REQUIREMENTS

Restart required: Might be required

Download size: 13 MB

Estimated time: 9 minutes

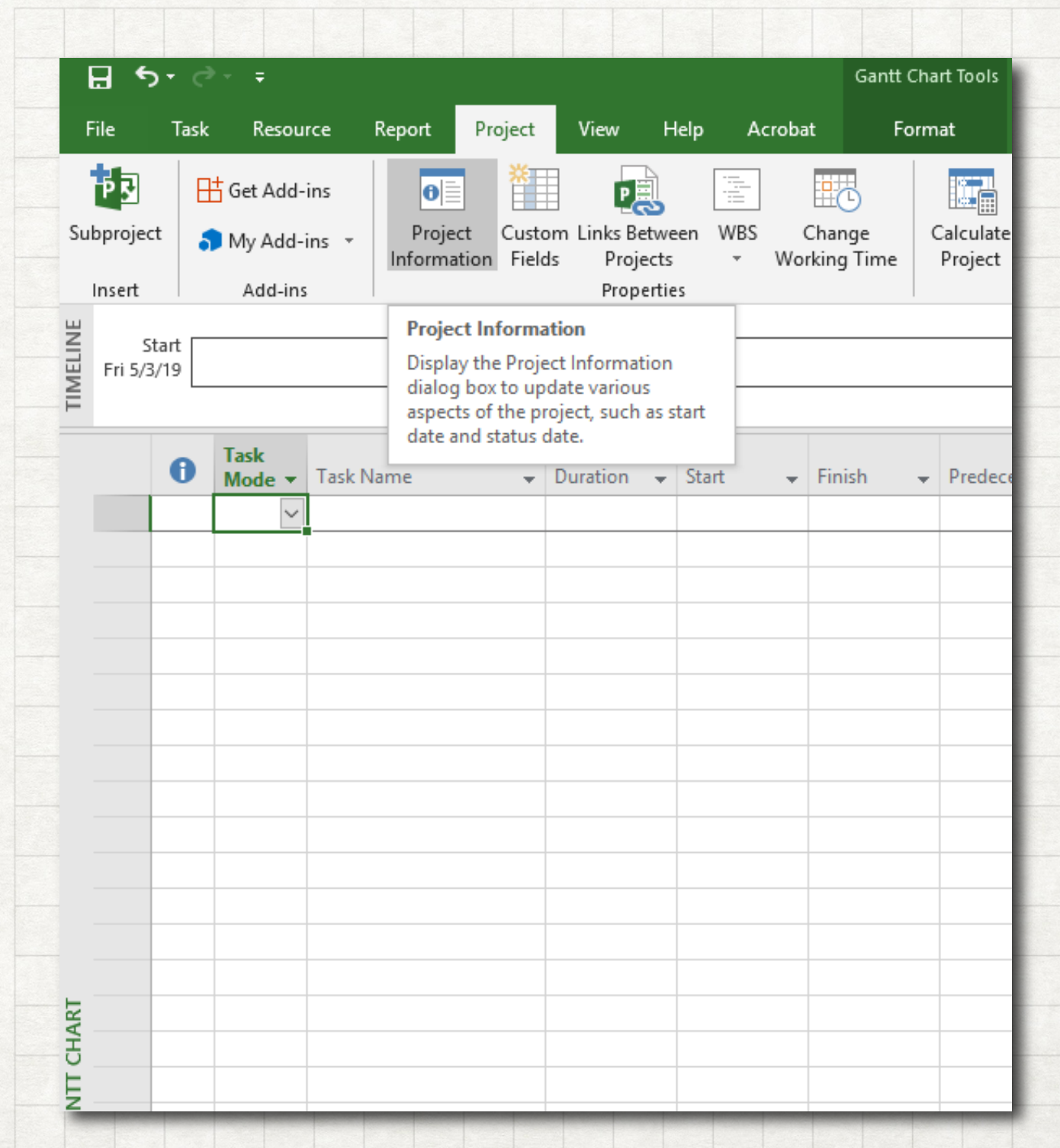
Total components: 1

DESCRIPTION

CREATING A NEW PROJECT

ENTERING PROJECT INFORMATION

- File – New – Blank Project
- Project – Project Information



ENTERING PROJECT INFORMATION

- Project – Project Information
- “Schedule From”
- Start and Current Dates
 - Start: enter 6/20/19
- Choosing a Calendar

Project Information for 'Project1'

Start date: Fri 5/3/19 Current date: Fri 5/3/19

Finish date: Fri 5/3/19 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Enterprise Custom Fields

Department:

Custom Field Name	Value
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Help Statistics... OK Cancel

CALENDARS

PRACTICE ADDING IN HOLIDAYS

File Task Resource Report Project View Help Acrobat Format Tell me what you want to do

Subproject Get Add-ins My Add-ins Project Information Custom Fields Links Between Projects WB Change Working Time Calculate Project Set Baseline Move Project Status Date: NA Update Project AB Spell

Insert Add-ins Properties Schedule Status Proof

Start Fri 5/3/19

Change Working Time

Set days off and change the working hours for the project or for specific resource

Change Working Time

For calendar: Standard (Project Calendar) Create New Calendar ...

Calendar 'TXState Holidays' is a base

Legend:

- Working
- Nonworking
- 31 Edited working hours

On this calendar:

- 31 Exception day
- 31 Nondefault work week

Click on a day to see its working times: May 3, 2019 is nonworking.

May 2019

S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Based on:
Exception 'Labor Day' on calendar 'TXState Holidays'.

Exceptions Work Weeks

	Name	Start	Finish
1	July 4th Holiday	7/4/2019	7/4/2019
2	Labor Day	9/2/2019	9/2/2019

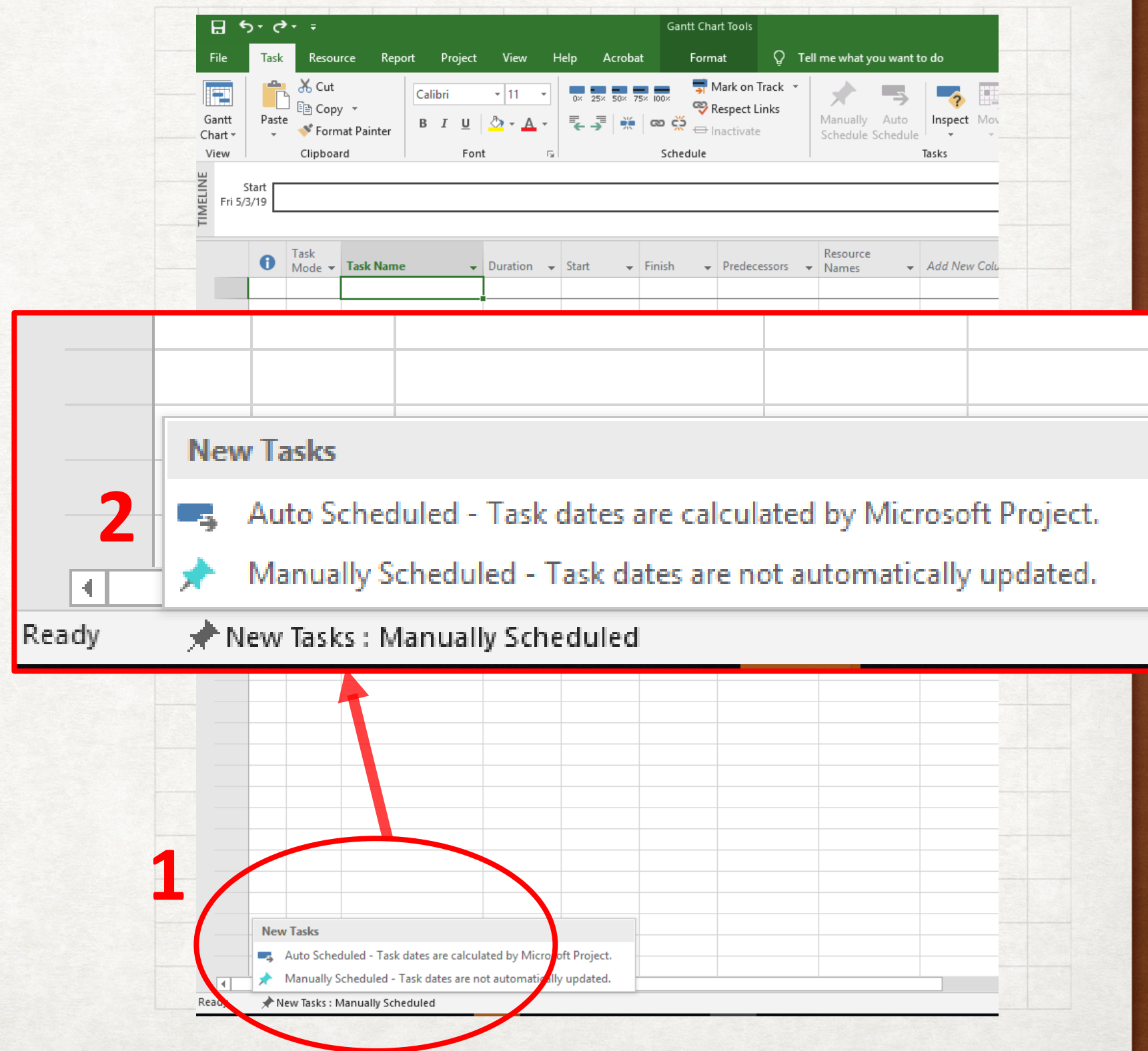
Details... Delete

Help Options... OK Close

CUSTOMIZING PROJECT

MANUAL VS AUTOMATIC SCHEDULING

- Manual Scheduling – if task dates are known and independent
- Auto Scheduling – take advantage of Project's power.
- Choose "Auto Scheduled" to make that the default for new tasks



LET'S GET STARTED!

- Start with WBS already made
 - Ours is at: bit.ly/txstproject
- I've converted the WBS into an excel-style table to make inputting easy
- Remember that we break it down into "Work packages" (tasks) whose duration/cost can be estimated

	Duration	Resource
Garage conversion into playroom		
<u>Garage cleanout</u>		
Clean out the garage	2	Homeowner
Sell unwanted items	1	Homeowner
Take trash to the dump	1	Homeowner
<u>Demolition</u>		
Tear out all existing walls	1	Crew
Tear out shelving	1	Crew
Remove garage door/unit	1	Crew
Sell garage door/unit online	1	Homeowner
<u>Framing</u>		
Frame out new wall for front door/windows	2	Contractor
Install insulation	1	Crew
<u>Plumbing</u>		
Move hot water heater	2	Crew
Install drainline	1	Contractor
Test plumbing	1	Contractor
<u>Electrical</u>		
Install new breakers	2	Contractor
Wire new outlets	3	Crew
Install lights and fan	2	Crew
Test electrical	1	Contractor
<u>Windows</u>		
Purchase windows	1	Homeowner
Install windows	1	Contractor
<u>Drywall</u>		
Install drywall	3	Crew
Tape and float seams/holes	1	Crew
Sand to finish	1	Crew
<u>Painting/Finishing</u>		
Apply texture to walls and ceiling	1	Crew
Paint walls and ceiling	1	Crew
<u>Siding</u>		
Install exterior siding	2	Contractor
Paint siding	1	Crew
<u>Other</u>		
Level concrete drive	2	Crew
Install A/C unit	1	Contractor
Insulate attic	1	Crew
House walkthrough	1	Homeowner
Punchlist	1	Contractor

INPUTTING TASKS

1. First input all “Task Names” in Task Name field – use just like Excel
 - Copy/paste from:
bit.ly/txstproject
2. Use “Indent” feature under “Task” ribbon tab to create “Summary Tasks” for hierarchical relationships
3. Input Durations ONLY for “work package” level

The screenshot shows the Gantt Chart software interface. The 'Task' ribbon tab is active, displaying options for 'Gantt Chart View', 'Paste', 'Format Painter', 'Clipboard', 'Font', 'Indent' (highlighted with a red circle), 'Mark on Track', 'Respect Links', 'Inactivate', 'Manually Schedule', and 'Auto Schedule'. A red box highlights the 'Indent' feature, which includes a dropdown menu and a 'Task Mode' button. Below the ribbon, a table lists tasks with columns for Task Mode, Task Name, Duration, and Start. The tasks are listed in a hierarchical manner, with 'Garage conversion into playroom' as the first task, followed by 'Garage cleanout', 'Clean out the garage', 'Sell unwanted items', 'Take trash to the dump', 'Demolition', 'Tear out all existing walls', 'Tear out shelving', 'Remove garage door', 'Sell garage door/unit', 'Framing', 'Frame out new wall', 'Install insulation', 'Plumbing', 'Move hot water heater', 'Install drainline', 'Test plumbing', 'Electrical', 'Install new breakers', 'Wire new outlets', 'Install lights and fan', 'Test electrical', 'Windows', 'Purchase windows', 'Install windows', 'Drywall', 'Install drywall', 'Tape and float seams', 'Sand to finish', 'Painting/Finishing', 'Apply texture to wall', and 'Paint walls and ceiling'.

Task Mode	Task Name	Duration	Start
	Garage conversion into playroom	1 day?	Fri 5/3/19
	Garage cleanout	1 day?	Fri 5/3/19
	Clean out the garage	1 day?	Fri 5/3/19
	Sell unwanted items	1 day?	Fri 5/3/19
	Take trash to the dump	1 day?	Fri 5/3/19
	Demolition	1 day?	Fri 5/3/19
	Tear out all existing walls	1 day?	Fri 5/3/19
	Tear out shelving	1 day?	Fri 5/3/19
	Remove garage door	1 day?	Fri 5/3/19
	Sell garage door/unit	1 day?	Fri 5/3/19
	Framing	1 day?	Fri 5/3/19
	Frame out new wall	1 day?	Fri 5/3/19
	Install insulation	1 day?	Fri 5/3/19
	Plumbing	1 day?	Fri 5/3/19
	Move hot water heater	1 day?	Fri 5/3/19
	Install drainline	1 day?	Fri 5/3/19
	Test plumbing	1 day?	Fri 5/3/19
	Electrical	1 day?	Fri 5/3/19
	Install new breakers	1 day?	Fri 5/3/19
	Wire new outlets	1 day?	Fri 5/3/19
	Install lights and fan	1 day?	Fri 5/3/19
	Test electrical	1 day?	Fri 5/3/19
	Windows	1 day?	Fri 5/3/19
	Purchase windows	1 day?	Fri 5/3/19
	Install windows	1 day?	Fri 5/3/19
	Drywall	1 day?	Fri 5/3/19
	Install drywall	1 day?	Fri 5/3/19
	Tape and float seams	1 day?	Fri 5/3/19
	Sand to finish	1 day?	Fri 5/3/19
	Painting/Finishing	1 day?	Fri 5/3/19
	Apply texture to wall	1 day?	Fri 5/3/19
	Paint walls and ceiling	1 day?	Fri 5/3/19

NOW GO!

STARTING YOUR PROJECT

1. New Project
2. Project – Information – choose “Start Date: 6/20/2019”
3. Project – Change Working Time – add in 7/4/2019, 9/2/2019
4. Change to “Auto Schedule Tasks”
5. Input Task Names FIRST (type from sheet or copy from bit.ly/txstproject)
6. Use “Indent” to create “Summary Tasks”
7. Input durations

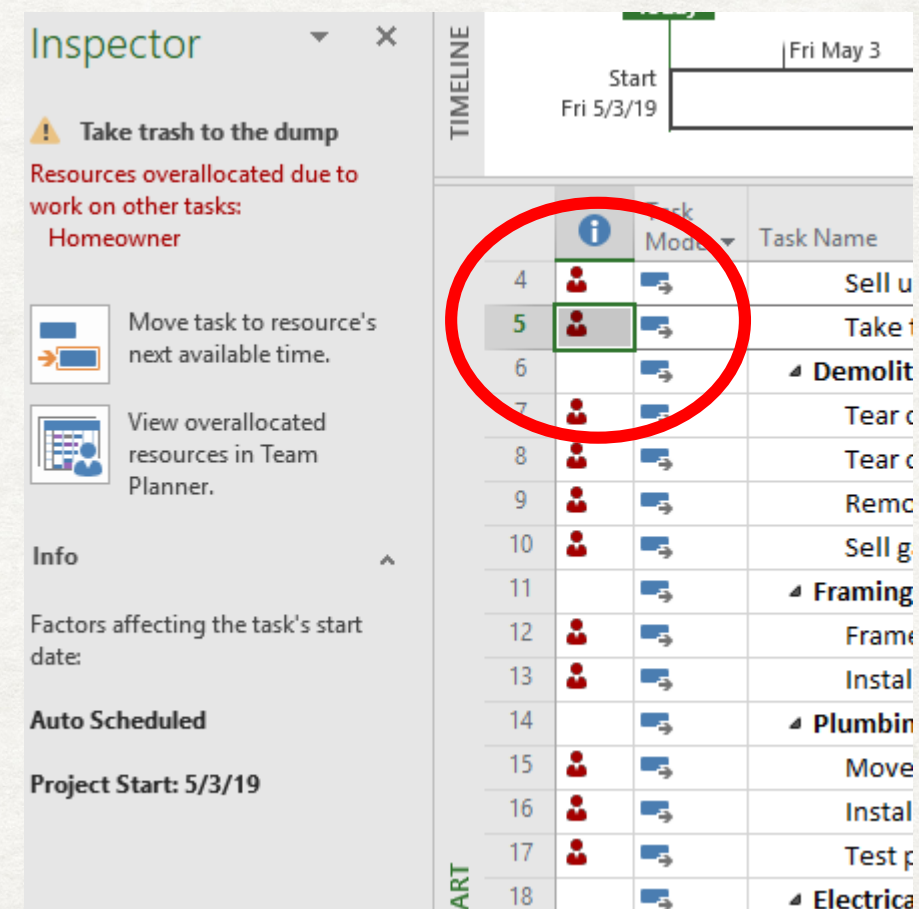
INPUT RESOURCES

- Input resources and hourly rates (highlighted below) into the “Resource Sheet” via “View” ribbon, then “Resource Sheet”
- Resources can be people (work) or things (material)
 - Work is cost per hour, material is cost per unit.

[illegible]

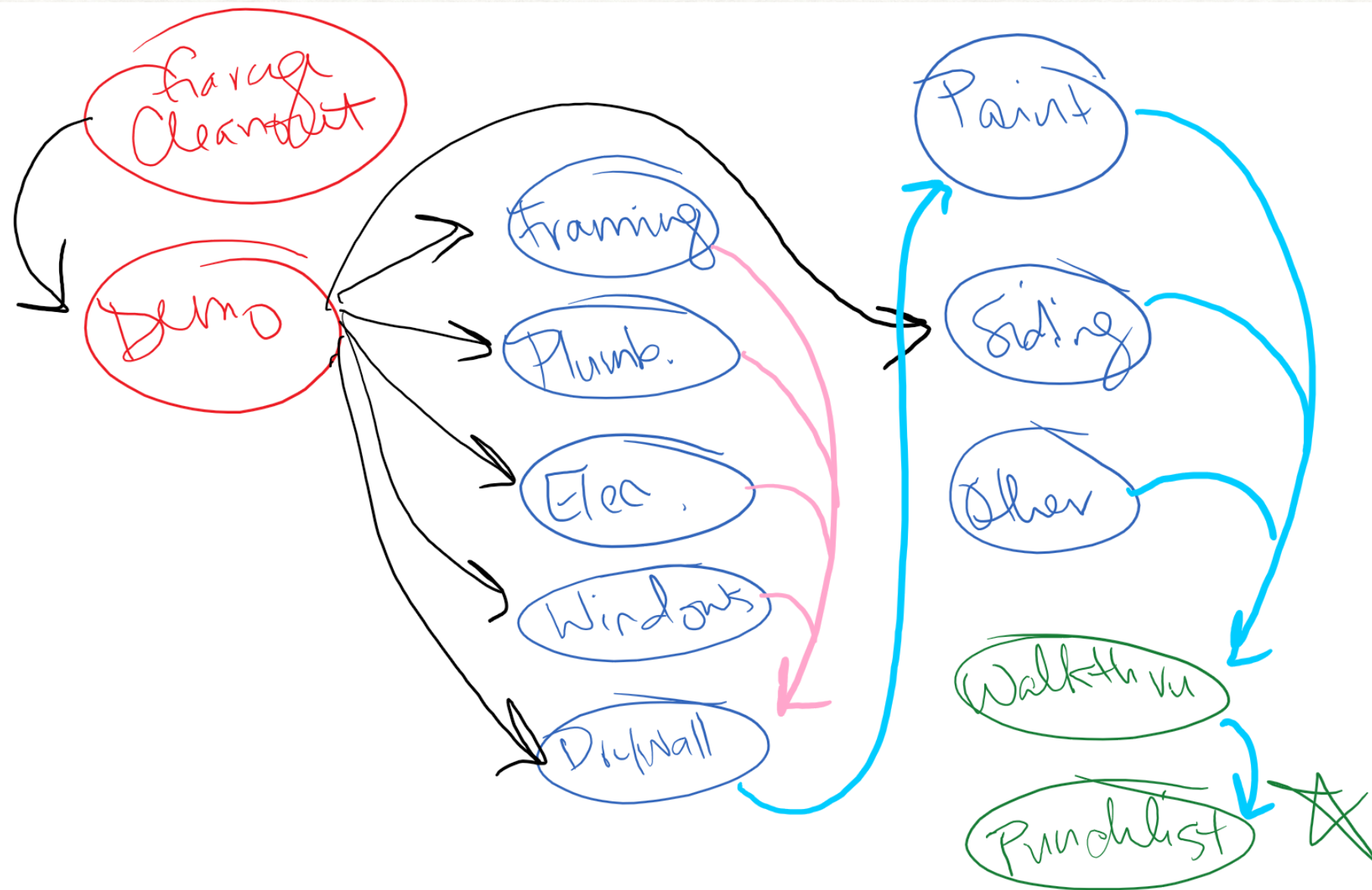
ASSIGN RESOURCES TO THE PROJECT

- Go back to “Gantt Chart” view
- Now, under “Resource Names” cells you have drop-down to choose existing resources.
- Advanced:
 - Type/choose into one, then fill-down with Ctrl-D for similar ones (just like Excel)
 - Or select multiple then go to Task Information
- Notice the little red figure to the left – you’ve overscheduled your resources!



MAPPING DEPENDENCIES

VISUAL REPRESENTATION OF DEPENDENCIES



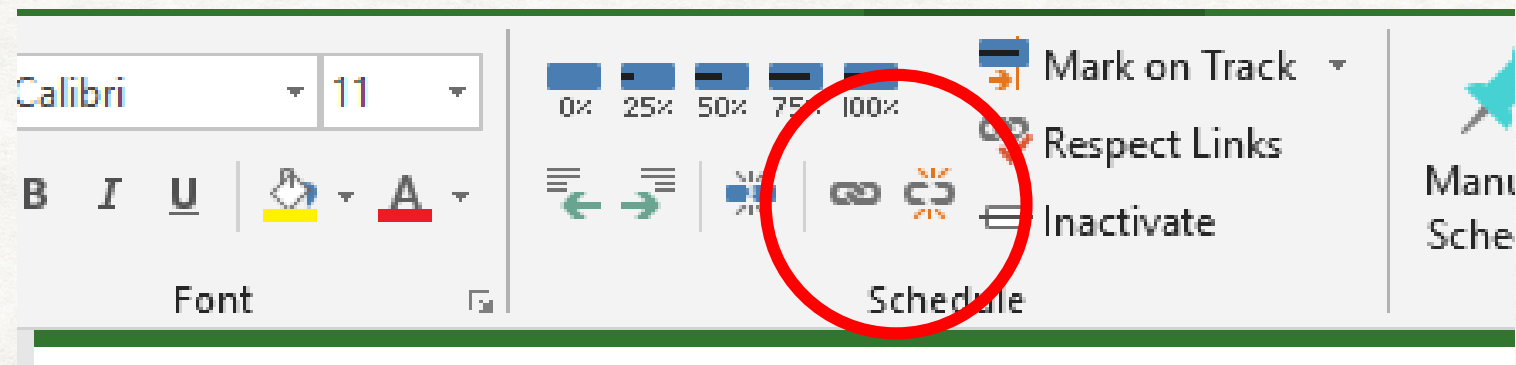
MAP DEPENDENCIES

DO THIS FOR **SUMMARY TASKS** ONLY

1. Before Demo can begin, you have to cleanout the garage
 - ☐ Next to task 6, type in predecessor 2
2. Before you can do framing, plumbing, electrical, windows, drywall, OR siding, you have to Demo
 - ☐ Next to tasks 11, 14, 18, 23, 26, 33 – type in predecessor 6
3. Before you can do drywall, you have to finish framing, plumbing, electrical, and windows,
 - ☐ Next to task 26, type in predecessors 11, 14, 18, 23
4. Before you can paint/finish, you have to finish drywall
 - ☐ Next to task 30, type in predecessor 26
5. Before you can do the house walkthrough, you have to finish painting, siding and “other”
 - ☐ Next to task 40, type in predecessors 30, 33, 36
6. Before you can do the punchlist, you have to do the house walkthrough
 - ☐ Next to task 41, type in predecessor 40

LINKING TASKS

ANOTHER WAY TO DO PREDECESSORS



- Linking makes lower tasks start before upper tasks – automatically creating dependencies
- Highlight each group of “work packages” (not the summary tasks) and “Link them”

NOW GO!

RESOURCES AND DEPENDENCIES

1. Under View – Resource Sheet type in the resources from earlier slide

i	Resource Name ▼	Type ▼	Material ▼	Initials ▼	Group ▼	Max. ▼	Std. Rate ▼	Ovt. ▼	Cost/Usr ▼	Accrue ▼	Base ▼
	Homeowner	Work		H		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
	Crew	Work		C		100%	\$15.00/hr	\$22.50/hr	\$0.00	Prorated	Standard
	Contractor	Work		C		100%	\$25.00/hr	\$37.50/hr	\$0.00	Prorated	Standard

2. Assign resources to the project according to handout
3. Map dependencies at SUMMARY level
 - Use your preferred visualization – visual or outline
4. Link “work packages” at the TASK level
 - Highlight a group and click “link” button”

FIX OVERALLOCATED RESOURCES

YOU MAY HAVE TO DO THIS REPEATEDLY

TIP:

Click the FIRST overallocated resource to get the “inspector”, then hold down **shift** and click to the bottom overallocated resource.

Now click, “Move task to resource's next available time”

Inspector

⚠ **Take trash to the dump**
Resources overallocated due to work on other tasks:
Homeowner

Move task to resource's next available time.

View overallocated resources in Team Planner.

Info

Factors affecting the task's start date:

Auto Scheduled

Project Start: 5/3/19

TIMELINE

Start
Fri 5/3/19

Fri May 3

		Task Mode ▾	Task Name
4			Sell u
5			Take t
6			▴ Demolit
7			Tear c
8			Tear c
9			Remo
10			Sell g
11			▴ Framing
12			Frame
13			Instal
14			▴ Plumbin
15			Move
16			Instal
17			Test p
18			▴ Electrica

ART

PREDECESSORS AND SUCCESSORS

SUMMARY TASK INFORMATION

- Double-click on a task to view the “Summary Task Information” box
 - *Also available in Task ribbon under “Information”*
- Note the “Predecessor” tab where you can view predecessors of this task.
- If there needs to be a lag time between tasks, you can account for that.
 - Double-click on “Sand to finish” (under Drywall). In the “Predecessor” Tab, for “Tape and Float” enter a 2 day lag time, because the tape and float needs time to cure before you sand it.
 - Notice how dates are all automatically adjusted, and look at the predecessor column now.

28FS+2 days

NOW GO!

ASSIGN RESOURCES, AND LAG TIME

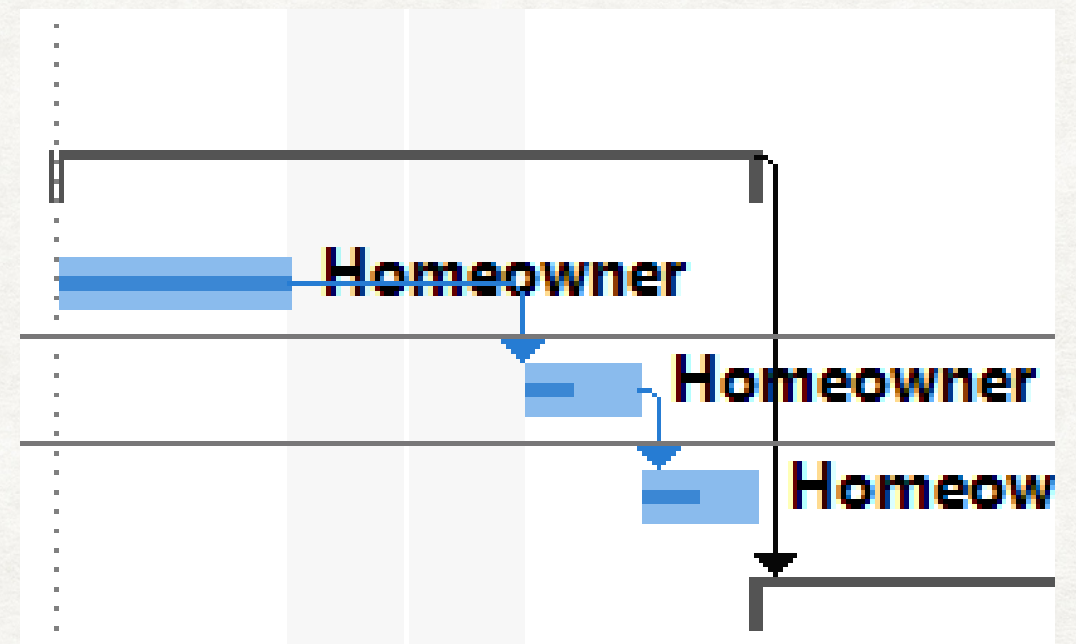
1. Click on the red person silhouette to view the “inspector” and highlight down to the last person silhouette
2. Click “Move task to resources next available time”
3. Double-click “Sand to finish” to view Task Information and
4. Assign a 2-day lag time to the predecessor of “Tape and Float”
 - ...because it takes 2 days for the Tape and Float to be dry enough to sand.

VIEWING THE GANTT CHART

- Automatically generated while you were typing
- Automatically adjusted as you worked
- Use Zoom and/or ctrl-mousewheel to adjust time frame
- Right-click in empty areas of the Gantt to customize its look and feel and what data is shown next to the bars

TRACKING AND REPORTING

- Right click on field headings to “Insert Column” and choose % Complete
- Go to a few of the “Work packages” and make them complete or partially complete.
- Type into the box, or choose from the preset fields in the Task ribbon
- Notice how the summary tasks are updated, and the Gantt Chart view reflects completion



KEEP PLAYING!!

- Save this project to your OneDrive account so you can go back and play with it later. Here are some ideas:
 - Make more tasks complete, then go to “Report” tab and choose the “Resource Cost Overview”.
 - Under Gantt Chart view, choose “Tracking Gantt”
 - Add new columns and play with the different types of columns
 - You can’t break it – keep playing. Use this as a test project file!

SHOW AND TELL

INTEGRATE PROJECT WITH SHAREPOINT FOR TASK LISTS

+ new task or edit this list				
All Tasks Calendar Completed ... <input type="text" value="Find an item"/>				
✓	☑	Task Name	Due Date	Assigned To
	☑	▲ Budget	... September 18, 2018	
	☑	Finalize Budget Proposal	... May 11, 2018	<input type="checkbox"/> Klemcke, Mavis A
	☑	Submit Budget Proposal	... May 14, 2018	<input type="checkbox"/> Klemcke, Mavis A
	☑	Budget Proposal Approved	... September 17, 2018	<input type="checkbox"/> Ancelet, Lisa
	☑	Update Budget Doc in SharePoint files	... September 18, 2018	<input type="checkbox"/> Ancelet, Lisa
	☑	▲ Picking a date	... May 21, 2018	
	☑	Check other conferences (ReThink)	... May 16, 2018	<input type="checkbox"/> Morganti, Dianna
	☑	Check school start dates	... May 16, 2018	<input type="checkbox"/> McClean, Jessica L
	☑	Check room availability	... May 10, 2018	<input type="checkbox"/> Klemcke, Mavis A
	☑	Finalize Date (Jan 11th)	... May 21, 2018	
	☑	Put on Various Calendars (see notes)	... May 21, 2018	<input type="checkbox"/> Klemcke, Mavis A
	<input type="checkbox"/>	▲ Room Logistics	... January 11	
	☑	Reserve room	... May 21, 2018	<input type="checkbox"/> Klemcke, Mavis A
	☑	Propose setup to team	... December 14, 2018	<input type="checkbox"/> Klemcke, Mavis A
	☑	Set Up the Day Of	... January 11	<input type="checkbox"/> Klemcke, Mavis A
	<input type="checkbox"/>	Breakdown and clean	... January 11	<input type="checkbox"/> Klemcke, Mavis A
	☑	Get Signup Table Volunteers	... December 5, 2018	<input type="checkbox"/> Klemcke, Mavis A
	<input type="checkbox"/>	Reserve Audiovisual equipment	... January 4	<input type="checkbox"/> Klemcke, Mavis A

HOW CAN I LEARN MORE??

- lynda.com has 125 courses on Project Management for self-paced learning in concepts and tools
- Career training from txstate.edu's partnership with Ed2Go:
 - Bonus: The hours in Ed2Go count toward official project management training hours*
- Learn how to become a CAPM® or PMP® through PMI
 - Project Management Institute or ProjectManagement.com

OR CONTACT YOUR FAVORITE LOCAL PMP®



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