### **Installing Project Online**

1. Go to <u>https://portal.office.com</u> and login with your account (you should have administrator rights).

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2. Choose: Other install options.



- 3. Choose: View apps & devices.
  - ✓ Office apps & devices You can install Office on up to 5 PCs or Macs, 5 tablets, and 5 smartphones.

| Install Office      |  |
|---------------------|--|
|                     |  |
| View apps & devices |  |

4. Choose: Project.



## **Before Starting Your First Project**

## Create a profile to connect to Project Server or Project Online

- 1. Open Microsoft Project Online.
- 2. When the application has opened, press the **Esc** key on your keyboard.
- 3. Click on the File tab in the upper left corner.
- 4. On the Info tab, click the **Manage Accounts** button.



 In the Project Web App Accounts dialog, click the Add button. Give the account/connection a name and specify the URL for your Project Server/PWA/Project Online instance. Also, check the Set as default account option and click OK.

| Account Properties             |        | ×    |
|--------------------------------|--------|------|
| Account Name:                  |        |      |
| Local Vanilla Admin            |        |      |
| Project Server URL:            |        |      |
| http://ew-svr04:100            |        |      |
| Set as <u>d</u> efault account |        |      |
|                                | OK Can | icel |

6. Select the **Choose an account** option and click **OK.** 

| Project Web App Acco    | ounts          |                    |                       |
|-------------------------|----------------|--------------------|-----------------------|
| Available accounts:     |                |                    |                       |
| Name                    | URL            |                    | Default               |
| Computer                |                |                    |                       |
| Local Vanilla Admin     | http://ew      | -svr04:100         | Yes                   |
|                         |                |                    |                       |
|                         |                |                    |                       |
|                         |                |                    |                       |
|                         |                |                    |                       |
| <u>A</u> dd             | <u>R</u> emove | Properties         | Set as <u>D</u> efaul |
| Current account: Com    | nuter          |                    |                       |
| o switch accounts, sele |                | ount below, and th | en restart Project.   |
| When starting           |                |                    |                       |
| O Use my default acc    | ount           |                    |                       |
| Choose an accoun        | -              |                    |                       |
|                         |                |                    |                       |
|                         |                |                    |                       |

7. Close Microsoft Project Online.

#### Set application default options

- 1. Open Microsoft Project Online and click **OK** on the login dialog.
- 2. When the application has opened, press the **Esc** key on your keyboard.
- 3. Click on the File tab in the upper left corner.
- 4. Click **Options** to open the Project Options dialog.



5. In the **General** tab, uncheck "Show the Start screen when this application starts."

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6. Select the **Schedule** tab.



7. Select **All New Projects** from the Calendar options for this project dropdown.

| Project Options    |  |
|--------------------|--|
| General<br>Display | Change options related to scheduling, calendars, and calcula |
| Schedule           | Calendar options for this project:                           |
|                    |  |

8. Set the calendar options for your organization.



9. Select **All New Projects** from the Scheduling options for this project dropdown.



10. Select **Auto Scheduled** from the New tasks created dropdown.

| Project Options    |   |                      | 7 | × |
|--------------------|---|----------------------|---|---|
| General<br>Display | Schedule  |                      |   | * |
| Schedule           | Show scheduling messages<br>Show assignment units as a: Perce | ntage *              |   |   |
| Proofing           | Scheduling options for this project:                          | 🔹 All New Projects 🔹 |   |   |
| Language           | New tasks created:  | Auto Scheduled 👻     |   |   |
| Advanced           | Auto scheduled tasks scheduled on:                            | Project Start Date * |   |   |

11. Select the **Advanced** tab.



12. Select **All New Projects** from the Display options for this project dropdown.



13. Check the **Show project summary** task option.

| Disable               | e hardware graphi                               | cs acceleratio  |  | -  |
|-----------------------|---|---|--|--|
|                       |   |   |  | _  |
| Disp <u>l</u> ay opti | ions for this proje                             |   |  |  |
|                       | this proje                                      | ect: 📑 Al   | II New Projects 🔻  | r  |
| <u>M</u> inutes:      | min   | •   | Weeks:   | wk   |
| Hours:                | hr  | -   | Mo <u>n</u> ths:   | mor  |
| <u>D</u> ays:         | day   | •   | <u>Y</u> ears:   | yr   |
| ✓ <u>A</u> dd sp      | ace before label                                |   |  |  |
| 🖌 Show p              | project <u>s</u> ummary t                       | task  |  |  |
|                       | <u>H</u> ours:<br>Days:<br>✓ Add sp<br>✓ Show p | Hours: hr<br>Days: day<br>✓ Add space before label<br>✓ Show project summary to | Hours: hr  Pays: day  Add space before label Show project summary task | Hours: hr ✓ Months:<br>Days: day ✓ Years:<br>✓ Add space before label<br>✓ Show project gummary task |

- 14. Click OK.
- 15. Close Microsoft Project.

#### **Starting Your First Project**

#### Create a new project

- 1. Open Microsoft Project Online.
- 2. Upon opening, Project will automatically set you up with a blank project.

#### Open a project from an existing file

- 1. Open Microsoft Project Online.
- 2. Click on File in the upper left corner.
- 3. Click on **Open.**



 Select the appropriate folder and file and click Open.

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#### Open a Project from a template

- 1. Open Microsoft Project Online.
- 2. Select the **File** tab.
- 3. Select the **New** menu item and click on the template icon.



4. Select and download your template.



## Adjust the Calendar

 The default Microsoft Project calendar is called Standard. To view and change this calendar within Project, select the **Project** tab on the ribbon under Properties. Click on the **Change Working Time** button.



- Once the Change Working Time dialog box opens, you will be viewing the Standard Calendar.
- To set a holiday as a non-working day, click on the Holiday Date. Click an Open Exception line at the bottom. Enter the holiday name. Click Enter. Recurring holidays may be entered

- 4. by clicking **Details** while selecting the holiday entry.
- To change daily working time, click on Work Weeks at the bottom. Click on Details. Select days of the week to be changed. Click the third radio button on the right and change the working times. Click Enter.
- 6. Click **OK** to close the box.



# Set the Project Start Date and apply the Project Calendar

- 1. Click the **Project** tab. Then click **Project** Information.
- 2. Enter the project Start Date.
- 3. Select the project Calendar and click OK.

| Start <u>d</u> ate: | Mon 10/10/16 09:00 | ~ c,         | urrent date: | Mon 10/10/16 09:00 | · · · · |
|---------------------|--------------------|--------------|--------------|--------------------|---------|
| Einish date:        | Mon 10/10/16 09:00 | ✓ <u>S</u> t | atus date:   | NA                 | ```     |
| Schedule from:      | Project Start Date | ~ 6          | alendar:     | Standard           |         |

#### Create Tasks

 Ensure the Gantt Chart view is active by selecting the **Task** tab on the ribbon and clicking the **Gantt Chart** button.



2. Click in the **Task Name** cells of the first empty task row and enter the name for the task/summary task.

3. Press the **Tab** key to move to the duration column and enter the duration in days.

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| F |   | MO | 1 10/10/16 0   | 19:00                   | _ |      |         | _ |                   |
|---|---|----|----------------|-------------------------|---|------|---------|---|-------------------|
|   |   | 0  | Task<br>Mode ▼ | Task Name               |   | Dura | ition - | • | Start             |
|   | 0 |    |                | 4 Project1              |   | 1 da | y?      |   | Mon 10/10/16 09:( |
|   | 1 |    |                | Plan project activities |   | 2    | L       | ÷ | Mon 10/10/16 09:0 |
|   |   |    |                |                         |   |      |         | _ |                   |

4. Create additional tasks and milestones as required for your project. Milestones are created by specifying zero days of duration.

|    | 0 | Task<br>Mode + | Task Name 👻             | Duration + | Start              | s | 10 Oct 16<br>M T W 1 |
|----|---|----------------|-------------------------|------------|--------------------|---|----------------------|
| 0  |   | -              | 4 Project1              | 15 days?   | Mon 10/10/16 09:00 |   | -                    |
| 1  |   | -              | Plan project activities | 2 days     | Mon 10/10/16 09:00 |   |                      |
| 2  |   | -              | Sprint One Activities   | 1 day?     | Mon 10/10/16 09:00 | 1 |                      |
| 3  |   | -              | Kick Off                | 0 days     | Mon 10/10/16 09:00 |   | • 10/10              |
| 4  |   | -              | Design                  | 5 days     | Mon 10/10/16 09:00 |   |                      |
| \$ |   | -              | Build                   | 15 days    | Mon 10/10/16 09:00 |   |                      |
| 6  |   | -              | Test                    | 8 days     | Mon 10/10/16 09:00 |   |                      |
| 7  |   | -              | Deploy                  | 5 days     | Mon 10/10/16 09:00 |   |                      |
| 8  |   | -              | Sprint Complete         | 0 days     | Mon 10/10/16 09:00 |   | 10/10                |

## **Creating a WBS/Outline Structure**

Make a task (or milestone) a subtask of the preceding one by selecting it and clicking on the **Indent Task** button from the **Task** ribbon tab. You can select multiple tasks if there is more than one subtask.

| Fil                                | le  | Task | Reso                               | urce           | Report         | Project                              | View | Team           | Fc         |
|------------------------------------|-----|------|------------------------------------|----------------|----------------|--------------------------------------|------|----------------|------------|
| Gant<br>Chart<br>Viev<br>10<br>NIT | t • |      | Cut<br>Copy<br>Format<br>Clipboard | Today<br>Start | Calibri<br>B I | - 11<br><u>U</u> <u></u> 2 -<br>Font |      | 0× 25× 50<br>₩ | × 75× 100× |
|                                    |     | 0    | Task<br>Mode 🔻                     | Task Na        | me             |                                      |      | uration 👻      | Start      |
|                                    | 0   |      |                                    | ⊿ Proje        | ect1           |                                      | 15   | days           | Mon 10     |
|                                    | 1   |      |                                    | Pla            | n projec       | t activities                         | 2 0  | days           | Mon 10/    |
|                                    | 2   |      |                                    | ⊿ Sp           | rint One       | Activities                           | 15   | days           | Mon 10/    |
|                                    | 3   |      |                                    |                | Kick Off       |                                      | 0 0  | days           | Mon 10/    |
|                                    | 4   |      |                                    |                | Design         |                                      | 5 0  | days           | Mon 10/    |
|                                    | 5   |      |                                    |                | Build          |                                      | 15   | days           | Mon 10/    |
|                                    | 6   |      |                                    |                | Test           |                                      | 8 (  | days           | Mon 10/    |
|                                    | 7   |      |                                    |                | Deploy         |                                      | 5 0  | days           | Mon 10/    |
|                                    | 8   |      | - 4                                |                | Sprint Co      |                                      | 0.0  | days           | Mon 10/    |

## **Create Task Dependency Relationships**

Creating relationships between tasks creates the timeline of the project. Select a **task**, hold the **Ctrl** key down, and select a second task. Then click the **Link** button on the Task ribbon tab. The first task becomes a predecessor, and drives the start date of, the second.

|                  | <b>9</b> • d |                           |  |                                      |                         |         |                          | Gantt C                                      | hart Tools                      |                                 |        |                   |                |
|------------------|--------------|---------------------------|--|--------------------------------------|-------------------------|---------|--------------------------|--|---------------------------------|---------------------------------|--------|-------------------|----------------|
| File             | Task         | Resou                     | ince   | Report                               | Project                 | View    | Team                     | For  | rmat                            | 🛛 Tell m                        | e wh   | at you i          | vant to d      |
| Gantt<br>Chart * | Paste        | Cut<br>Copy<br>Format     | Painter  | Calibri<br>B I                       | - 1<br><u>U</u> <u></u> | 1 -<br> |                          | 007 757 000<br>                              | Respe                           |                                 | N      | Anuall<br>ichedul | Auto<br>Schedu |
|                  |              |                           | Today  |                                      |                         |         |                          |  |                                 |                                 |        |                   |                |
| IIMEUNE          | Ио           | 10/10/16 0                | Start  |                                      |                         |         |                          |  |                                 |                                 | _      |                   | 17 0           |
|                  | i/o          |                           | Start  | -                                    |                         | * D     | uration 👻                | Start  |                                 | ▼ Fini                          | 5      | 10 Oct            |                |
| 0                |              | 10/10/16 0                | Start<br>19:00                                     | ime                                  |                         |         | uration 🗸                |  | 10/16 09:                       |                                 | 5      |                   | 16             |
|                  |              | Task<br>Mode ¥            | Start<br>19:00<br>Task Na                          | ime<br>oct1                          | ct activities           | -1      |                          | Mon 10/                                      | <b>10/16 09</b> ;<br>10/16 09:0 | 00 Mo                           | s      |                   | 16             |
| 0                |              | Task<br>Mode 🕶            | Start<br>19:00<br>Task Na<br>4 Proj<br>Pla         | ime<br>oct1<br>an proje              | ct activities           |         | 5 days                   | Mon 10/<br>Mon 10/1                          |                                 | 00 Mo<br>0 Wee                  | s      |                   | 16             |
| 0                |              | Task<br>Mode 👻            | Start<br>19:00<br>Task Na<br>Proj<br>Pla           | ime<br>oct1<br>an proje              | Activities              |         | <b>5 days</b><br>days    | Mon 10/2<br>Mon 10/2<br>Mon 10/2             | 10/16 09:0                      | 00 Mo<br>0 Wes<br>0 Mo          | s      |                   | 16             |
| 1                |              | Task<br>Mode <del>*</del> | Start<br>19:00<br>Task Na<br>4 Proj<br>Pla<br>4 Sp | ime<br>oct1<br>an projei<br>rint One | Activities              |         | 5 days<br>days<br>5 days | Mon 10/2<br>Mon 10/2<br>Mon 10/2<br>Wed 12/2 | 10/16 09:0<br>10/16 09:0        | 00 Mo<br>0 Wee<br>0 Mo<br>0 Wee | s<br>( |                   | 16<br>W 1      |

Multiple tasks and milestones can be linked by selecting multiple rows (hold down the Shift and/or Ctrl keys) when selecting task rows.



Best Practice Tip: Do not link summary tasks.

## **Inserting and Deleting Tasks**

To insert a new task row into the middle of your project schedule, select a task and either:

- Press the Insert key on your keyboard, or
- Right click the row and select **Insert Task**.

A blank row will be inserted above the selected task.

To delete a task from your project schedule, right click on the task and select **Delete Task**.

| e | Task<br>Mode 🗸 | Task Name               |          | ibri - 11                | ·               |
|---|----------------|-------------------------|----------|--------------------------|-----------------|
| 0 |                |                         | В        | I 🖉 - 🗛 - 📼              | 😒 100× T 🔽      |
| 1 |                | Plan project activities |          |                          | /10/16 09:      |
| 2 |                | Sprint One Activities   | 78       | <u>C</u> ut Cell         | <b>)/16 09:</b> |
| 3 | -,             | Kick Off                |          | <u>C</u> opy Cell        | )/16 09:0       |
| 4 | -,             | Design                  | Ê        | <u>P</u> aste            | )/16 09:0       |
| 5 |                | Build                   | 1        | Paste Special            | )/16 09:0       |
| 6 |                | Test                    | <b>6</b> | Scroll to Task           | /16 09:0        |
| 7 |                | Deploy                  | -4       |                          | l/16 09:        |
| 8 |                | Sprint Complete         | Ш        | Insert Task              | l/16 09:        |
|   |                |                         | ιL       | <u>D</u> elete Task      |                 |
|   |                |                         | 1        | Inacti <u>v</u> ate Task |                 |
|   |                |                         | *        | Manually Schedule        |                 |

**Best Practice Tip:** Pressing the **Del** key will remove the contents of the selected cell; it does not delete the task.

## **Working with Resources**

#### Build a team using enterprise resources

 With Microsoft Project open, click on the View tab on the ribbon bar and select Resource Sheet under Resource Views.

| 1 5· 0                          | Ŧ   |        |                                |        |  | Gantt | Chart Tools        |
|---------------------------------|---|--------|--------------------------------|--------|--|-------|--------------------|
| File Task                       | Resource  | Report | Project                        | View   | Team   | Fo    | ormat              |
| Gantt Task<br>Chart • Usage • 5 | Network Diagr<br>Calendar 🔹<br>Other Views *<br>Views |        | Team Reso<br>lanner + Pla<br>R | urce R | esource Usa<br>esource She<br>Other Views +<br>ews | et 🔹  | AJ E<br>Sort Outli |

 Click on the Resource tab on the ribbon, select Add Resources under Insert, and choose Build Team from Enterprise.

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- 3. In the Build Team dialog, select one or more enterprise resources from the list on the left side. Use the Shift and/or Ctrl keys to select multiple resources at once.
- Press the Add button to move the selected resources to the list on the right side of the dialog.



5. Select additional resources, if required, and then click **OK**.



#### Assign resources to tasks

1. Click the **Gantt Chart** button on the Task ribbon to return to the Gantt Chart view.

|                  | 5 · 0      | ÷               |         |              |              |
|------------------|------------|-----------------|---------|--------------|--------------|
| File             | Task       | Resource        | Report  | Project      | View         |
|                  | 5          | X Cut           | Calibri | - 11         | • 02         |
| Gantt<br>Chart ▼ | Paste<br>* | 🖻 Copy 👻        | B I     | <u>u</u> 👌 - | <u>A</u> - 두 |
| View             |            | Clipboard       |         | Font         | G.           |
|                  | 0          | Resource Name   | -       | Туре 🔻       | Material     |
| 1                |            | Adrian Balfour  |         | Work         |              |
| 2                |            | Gabrielle O'Dor | novan   | Work         |              |
| 3                |            | Jennifer Darich | uk      | Work         |              |
| 4                |            | Rob White       |         | Work         |              |
|                  |            |                 |         |              |              |

 Click in the Resource Name's cell of a task you wish to assign and click the **dropdown arrow**. Select the resource or resources you wish to assign to the task.

| Task Name 👻             | Duration + | Start 👻            | Resource<br>Names • T W T |
|-------------------------|------------|--------------------|---------------------------|
|                         | 35 days    | Mon 10/10/16 09:00 |                           |
| Plan project activities | 2 days     | Mon 10/10/16 09:00 | ~                         |
| A Sprint One Activities | 33 days    | Wed 12/10/16 09:00 | Adrian Balfour            |
| Kick Off                | 0 days     | Wed 12/10/16 09:00 |                           |
| Design                  | 5 days     | Wed 12/10/16 09:00 |                           |
| Build                   | 15 days    | Wed 19/10/16 09:00 | Kob White                 |
| Test                    | 8 days     | Wed 09/11/16 09:00 |                           |
| Deploy                  | 5 dave     | Mon 21/11/16 09:00 |                           |

 Alternatively, you can type resource names directly into the Resource Name cell. If you need to enter more than one, separate the resources with commas.

| Task Name               | Duration + | Start +            | Resource Names                      |   |   |
|-------------------------|------------|--------------------|-------------------------------------|---|---|
| # Project1              | 35 days    | Mon 10/10/16 09:00 |                                     | _ |   |
| Plan project activities | 2 days     | Mon 10/10/16 09:00 | Adrian Balfour, Gabrielle O'Donovan | ¥ | П |
| Sprint One Activities   | 33 days    | Wed 12/10/16 09:00 |                                     | - | - |
| Kick Off                | 0 days     | Wed 12/10/16 09:00 |                                     |   |   |

## View all Task and Resource assignments for a project

1. To view resource assignments for tasks, click the **Task Usage** button on the View ribbon.

| File File | Tasi        |                           | urce Report Project V                       | iew Tea  |         | Usage Too<br>Format |                | e what you w        |
|-----------|-------------|---------------------------|---|----------|---------|---------------------|----------------|---------------------|
|           | Hard of the | Calend                    | /iews * Planner * Plan *                    | Resource | Sheet + | A<br>Z↓<br>Sort     | Outline Tables | Highligh<br>Filter: |
|           | 0           | Task<br>Mode <del>v</del> | Task Name 🔫                                 | Work +   | Details | s                   | 10 Oct 16<br>M | 1                   |
| 0         |             | 85                        | * Project1                                  | 32 hrs   | Work    |                     | 16h            | 16h                 |
| 1         |             |                           | <ul> <li>Plan Project Activities</li> </ul> | 32 hrs   | Work    |                     | 16h            | 16h                 |
|           |             |                           | Adrian Balfour                              | 16 hrs   | Work    |                     | Sh             | 8h                  |
|           |             |                           | Gabrielle O'Donovon                         | 16 hrs   | Work    |                     | Sh             | 8h                  |
|           |             |                           |   |          |         |                     |                |                     |

2. To view task assignments for resources, click the **Resource Usage** button on the View

| ribbon.     |  |
|-------------|--|
| 8 5· c· · · |  |

| 8                  | 2.0            | t e la                                   |                  |   | Resi      | ource Usage Ti | 2011       |                                      |
|--------------------|----------------|--|------------------|---|-----------|----------------|------------|--------------------------------------|
| File               | Tasi           | k Resource Report Pe                     | oject Vie        | ew Tei                                      | m         | Format         | Q 1        | ell me wha                           |
| Gantt<br>Chart = U | Task<br>sage - | Calendar * Team<br>Other Views * Planner | Resource<br>Plan | Resource<br>Resource<br>Other V<br>ce Views | e Sheet 🔹 | Sort Ou        | dine Table | High.<br>▼ Filter:<br>⊡ Grou<br>Data |
|                    | 0              | Resource Name 🗸                          | Work -           | Details                                     | 5         | 10 Oct 16<br>M | τ          | Ŵ                                    |
|                    |                | Ja Unassigned                            | 0 hrs            | Work  |           |                |            |                                      |
| _                  | _              | Kick Off                                 | 0 hrs            | Work  |           |                |            |                                      |
|                    |                | Design                                   | Ohrs             | Work  |           |                |            |                                      |
|                    |                | Build                                    | Ohrs             | Work  |           |                |            |                                      |
|                    |                | Test                                     | Ohrs             | Work  |           |                |            |                                      |
|                    |                | Deploy                                   | 0 hrs            | Work  |           |                |            |                                      |
|                    |                | Sprint Complete                          | 0 hrs            | Work  |           |                |            |                                      |
| 1                  |                | Adrian Balfour                           | 16 hrs           | Work  |           | sh             | sh         |                                      |
|                    |                | Plan Project Activities                  | 16 hrs           | Work  |           | 8h             | 8h         |                                      |
| 2                  |                | <ul> <li>Gabrielle O'Donovan</li> </ul>  | 16 hrs           | Work  |           | Bh             | Sh         |                                      |
|                    |                | Plan Project Activities                  | 16 hrs           | Work  |           | 8h             | 8h         |                                      |
| 3-                 |                | Jennifer Darichuk                        | 0 hrs            | Work  |           |                |            |                                      |
| - 4                |                | Rob White                                | 0 hrs            | Work  |           |                |            |                                      |

#### Assign a Calendar to a Task

Note that when a task needs to be performed outside of normal working hours of the Project Calendar, a Task Calendar may be assigned to alter the timeframe for an individual task.

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- To assign a Task Calendar, with Microsoft Project open, select the Gantt Chart view.
- 2. Select the **Task** you wish to assign to the calendar.
- 3. Double click the task or click the **Information** button on the Task ribbon tab.



4. Select the **Advanced tab** and change the **Calendar** in the Calendar dropdown menu.

| Constrain task    |       |                 |     |                  |                |             |
|-------------------|-------|-----------------|-----|------------------|----------------|-------------|
| Deadjine:         | NA    |                 |     | ~                |                |             |
| Constraint type:  | As S  | oon As Possible | ~   | Constraint date: | NA             | ~           |
| Task type:        | Fixe  | d Units         | ~   | Effort driven    |                |             |
| Calendar:         | Non   | e               | - V | Scheduling is    | gnores resourc | e calendars |
| WBS code:         | 2,4   |                 |     |                  |                |             |
| Earned galue meth | od:   | % Complete      | - U |                  |                |             |
| Mark task as mile | stone |                 |     |                  |                |             |

5. Click OK.

#### **Working with Views**

#### Select a View

- 1. With Microsoft Project open, select the **View** ribbon.
- 2. Under the Task View and Resource View sections, select the view you wish to use.



#### Change the way the data is viewed

1. You can apply predefined filters and grouping to the view by using the **Filter** and **Group By** dropdowns in the Data section.



 You can also filter a view using the quick filter for one or more columns. Click the **down arrow** in the column header to show filter options.



3. To sort a view, select a sort order from the **Sort** dropdown on the View ribbon tab.

|                   |            |              |                       | Gantt | Chart <sup>-</sup> | Fools          |        |         |
|-------------------|------------|--------------|-----------------------|-------|--------------------|----------------|--------|---------|
| port              | Project    | View         | Team                  | F     | ormat              |                | ç      | Tell me |
| r<br>Tea<br>Planr | ier * Plan | 🗸 🔁 Othe     | urce She<br>r Views * | et v  | A<br>Z<br>Sort     | Out            | Ŧ      | Tables  |
|                   | Re         | source Views |                       |       |                    | by S <u>t</u>  | art D  | ate     |
| е                 | -          | Duration     | - Start               |       |                    | by <u>F</u> ir | nish   | Date    |
| Guide             | Project    | 35 days      | Mor                   | 10/1  |                    | by <u>P</u> r  | iority | / -     |
| Project           | Activities | 2 days       |                       | 10/10 |                    | by <u>C</u> o  | ost    | .drii   |
| it One A          | ctivities  | 33 days      | Tue :                 | 11/10 |                    | by <u>I</u> D  |        |         |
| ck Off            |            | 0 days       | Tue 1                 | 1/10  | ₽Ļ                 | Sort E         | ly     | 11      |
| esign             |            | 5 days       | Wed                   | 12/10 | 160                | 9.00           |        |         |

4. Alternatively, sort using the column dropdown menu.



#### Create a new View

- With Microsoft Project open, click on the View tab.
- To create a new task view, click on the More Views option in the Other Views dropdown in the *Task Views* section. To create a new resource view, click on the More Views option in the Other Views dropdown in the Resource Views section.



 When the dialog box opens, click on the New button.

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| More Views                                  |       | ×            |
|---|-------|--------------|
| Views:                                      |       |              |
| Bar Rollup<br>Calendar                      | ^     | <u>N</u> ew  |
| Descriptive Network Diagram<br>Detail Gantt |       | <u>E</u> dit |
| Gantt Chart                                 |       | Com          |
| Gantt with Timeline<br>Leveling Gantt       |       | <u>C</u> opy |
| Milestone Date Rollup                       |       | Organizer    |
| Multiple Baselines Gantt                    |       |              |
| Network Diagram                             | Y     |              |
|   | Apply | Cancel       |

4. Select **Single View** and click on **OK**.

| Define New View |    | ×      |
|-----------------|----|--------|
| Single view     | N  |        |
| Help            | ОК | Cancel |

 When the view definition dialog box opens, name your new view, select the Screen (type of view) you want displayed, and (when appropriate) the table to be displayed. Then, click OK.

| View De                    | finition in 'MPUG Guide Project' X |
|----------------------------|------------------------------------|
| Name:                      | Project Baseline                   |
| S <u>c</u> reen:           | Gantt Chart 🗸                      |
| <u>T</u> able:             | Baseline ~                         |
| <u>G</u> roup:             | <u> </u>                           |
| <u>F</u> ilter:            | ~ ·                                |
| □ H <u>ig</u> hl<br>☑ Show | -                                  |
| <u>H</u> elp               | OK Cancel                          |

## Add a Timeline

1. To view the timeline, check the **Timeline** option on the ribbon's View tab.



2. The timeline will then appear under the ribbon.

| Network Diagram                 | E fermate Unige -                | 計唱   | Highlight [No Highlight] -   | Timeso |
|---------------------------------|----------------------------------|------|------------------------------|--------|
| Latendar *                      | Tears Resource Sheet -           | Z4 = |                              | Days   |
| hart + Usage + 🚰 Other Viewst.+ | Playter + Plan + D Other Views + | · ·  | . [[? Group by: [No Group] + |        |
| Tera Views                      | Resource Views                   |      | Outa                         |        |
| fue 11/10/16/00/00              | Toda                             | 7    | 110-2                        |        |
| 100 million (100 million)       | 17 Oct 16                        |      | j24 Oct '16                  |        |
| Man 13/15/16 OK00               |                                  |      |                              |        |

 To add a task or milestone to the timeline, right click it (in the Gantt Chart view) and select Add to Timeline.

| 0 | Task<br>Mode + | Task Name                                 | Calibri - 11 -      |
|---|----------------|---|---------------------|
|   | -              | MPUG Guide Project                        | B I 💁 · 🛕 · 00 😋    |
|   | -              | Plan Project Activities                   | 2 days Mon 14       |
|   | 80             | <ul> <li>Sprint One Activities</li> </ul> | 👗 Crit Cell         |
|   | -              | Kick Off                                  | Ba Copy Cell        |
|   | 10             | Design                                    | C Easte             |
|   | <b>e</b> 2     | Build                                     | Paste Special       |
|   | -              | Test                                      | Scroll to Task      |
|   | R.,            | Deploy                                    |                     |
|   | -              | Sprint Complete                           | (risert Task        |
|   |                |   | Delete Task         |
|   |                |   | Inactigate Task     |
|   |                |   | 🖈 Manually Schedule |
|   |                |   | Autg Schedule       |
|   |                |   | al Assign Resources |
|   |                |   | Ell Down            |
|   |                |   | Glear Contents      |
|   |                |   | information         |
|   |                |   | Notes               |
|   |                |   | Add to Timeline     |
|   |                |   | B Hyperlink         |

4. By default, a timeline view has only one timeline. You can add additional timelines by clicking the **Timeline Bar** button on the Format ribbon tab. Note that the Format ribbon is context-sensitive, so ensure that the Timeline view has the proper focus by clicking within it.

| ✓ Overlapped Tasks<br>✓ Pan & Zoom<br>iled<br>Inne Text Lines: 1 ▼ |  |
|--|--|
| w/Hide   | e Existing<br>Tasks Task Callout Mile<br>Tasks |

 If you have multiple timelines, ensure you have checked the appropriate one before adding a task or milestone. Tasks and milestones can be moved between timelines simply by dragging and dropping them.



## **Managing a Project**

#### Set a Baseline

- 1. With Microsoft Project open, select **the Project** tab.
- 2. Under the Schedule section, click on Set Baseline.

| Report       | Project  | View                   | Team | Format       |       | Q     | Tell me wł     | hat you w           | vant to do                    |
|--------------|----------|------------------------|------|--------------|-------|-------|----------------|---------------------|-------------------------------|
| 0<br>Project | Custom I | inks Between           | WBS  | Change       |       | ulate | <b>S</b> et    | Move                | Status Date: 📕<br>📰 Update Pr |
| nformation   | Fields   | Projects<br>Properties | *    | Working Time | Pro   | ject  | Baseline •     | Project<br>Baseline | . Status                      |
| lame         |          |                        | -    | Duration 👻   | Start | :m]   | 😴 <u>C</u> lea | ar Baselin          | e25                           |

3. The Set Baseline dialog box will open. Select the **Baseline** you wish to set.

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4. Select whether the Baseline will be for the Entire Project or just for Selected Tasks. Click **OK**.

| Set Baseline ×                               |   |  |  |  |  |
|--|---|--|--|--|--|
| • Set bas                                    | eline   |  |  |  |  |
|  | Baseline ~  |  |  |  |  |
| ○ Set inte                                   | rim <u>p</u> lan  |  |  |  |  |
| <u>C</u> opy;                                | Scheduled Start/Finish $\lor$   |  |  |  |  |
| Into:  | Start1/Finish1 🗸  |  |  |  |  |
| For:<br>• Entire project<br>• Selected tasks |   |  |  |  |  |
| Ro   | II up baselines:  |  |  |  |  |
| To <u>all summary tasks</u>                  |   |  |  |  |  |
|  | Erom subtasks into selected summary task(s)<br>Set as <u>D</u> efault |  |  |  |  |
| <u>H</u> elp                                 | OK Cancel   |  |  |  |  |

### Enter progress using Percent Complete

- With Microsoft Project open, go to the Tracking Gantt chart view and select the Task Name column.
- 2. Click on a task you wish to update.
- 3. On the **Task** tab, click the appropriate update percentage for the task in the Schedule section.



4. Note the update values to the right of the Gantt bars in the Tracking Gantt chart view.



**Best Practice Tip:** % Complete represents the percentage of task duration that's complete. % Work Complete is the percentage of task work hours that are complete. You probably know that time can pass without a corresponding amount of work getting done. When the percent duration is updated, the percentage of work completed is updated also.

## Reporting

#### Create a project report

With Microsoft Project open, select the Report tab.

 Under the View Reports section, select one of the canned reports from Dashboards, Resources, Costs, or In Progress.



2. To create a new report, select the report style from the **New Report** dropdown.



### Create a visual report

1. Click on Visual Reports, under the Project tab.

|             |         |         |     |           |        | Gantt Ch | art Tools |
|-------------|---------|---------|-----|-----------|--------|----------|-----------|
| Report      | Pre     | oject   | Vie | ew T      | eam    | Forr     | nat       |
|             |         |         |     |           |        |          |           |
| ; Resources | Costs   | In Prog |     |           | Custom | Recent   | Visual    |
| *           | Ŧ       | -       |     | Started - | -      | · ·      | Reports   |
| V           | 'iew Re | ports   |     |           |        |          | Export    |

2. When the Create Report Dialog opens, select the desired report from the tabs and click **View**.

| Task Summar           | y Resource Su  |                              | ia                    |
|-----------------------|--|------------------------------|-----------------------|
|                       |  | surce Usage Assignment Usage | New Template          |
|                       | Baseline Cost Report     Baseline Report     Baseline Report     Baseline Report     Baseline Report |                              | Edit Template         |
| Baseline R            |  | Resource Status Report       | Egic temptate         |
|                       | fork Report  | Resource Status Report       | Manage Template       |
| Budget Co<br>Budget W |  | Resource Work Availabil      | Sample                |
| Cash Flow             |  | Task Status Report           |                       |
| Cash Flow             | Report   | Task Status Report           |                       |
| Cash Flow             |  |                              |                       |
|                       | sks Status Report<br>sks Status Report   |                              |                       |
|                       | ue Over Time Report  | ort                          |                       |
|                       | Availability Report  |                              | and the second second |
|                       | Availability Report  |                              |                       |
| ¢                     |  | >                            |                       |
| Select level of up    | age data to include  | e in the report: Weeks       |                       |
|                       | t templates from:  | weeks 0                      |                       |
|                       | e cempiaces from.  |                              | Province -            |
| 100                   |  |                              | Mgilth                |
|                       |  |                              |                       |

 Your report will open in either Microsoft Excel or Microsoft Visio, depending on which format you select.

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#### **Sprint Projects**

In Microsoft Project Online, you can build an Agile/Sprint Projects.

#### Create new sprint project

- 1. Open Microsoft Project Online. Click **OK** on the login dialog.
- 2. Click on the File tab in the upper left corner.
- 3. Click New and choose Sprint Projects.



- 4. The **Sprint Planning Board** View is created with three Sprints.
- 5. To Manage Sprints, click on **Sprint** Tab, and then choose **Manage**.

| File Task |          |     | View Help | Sprints Task Board Format | ,O Tell me what you wan |
|-----------|----------|-----|-----------|---------------------------|-------------------------|
| Views     | Sprints  |     |           |                           |                         |
| No        | o Sprint | Spr | rint 1    | Sprint 2                  | Spri                    |

 Change Sprint duration, Start Date, and/or add a new Sprint.

| Manage Sprints |               |        |             |             | >    |
|----------------|---------------|--------|-------------|-------------|------|
| Name           |               | Length | Start       | Finish      | 1    |
| No Sprint      |               | 0d     | NA          | NA          |      |
| Sprint 1       |               | 2w     | Thu 6.1.22  | Wed 19.1.22 |      |
| Sprint 2       |               | 2w     | Thu 20.1.22 | Wed 2.2.22  |      |
| Sprint 3       |               | 2w     | Thu 3.2.22  | Wed 16.2.22 |      |
|                |               |        |             |             |      |
| Add Sprint     |               | _      |             |             |      |
| Sprint Start:  | Thu 17.2.22 🗸 |        |             |             |      |
| Duration:      | 2w            |        |             |             |      |
| Add Sprint     |               |        |             |             |      |
|                |               |        |             | OK Car      | ncel |

 Add a Task to the Board (under No Sprint Column) and move it to the proper Sprint (drag and drop).

| P | 🗑 9° (° ° v                                 |                      |                                   | Project3 - Project Professional |
|---|---|----------------------|-----------------------------------|---------------------------------|
|   | File Task Resource Report Project           | View Help Sprints Ta | sk Board Format 💫 Tell me what yo | u want to do                    |
|   | Teak Planning Spirit<br>Board Views Spirits |                      |                                   |                                 |
|   | × •   |                      |                                   |                                 |
|   |   |                      |                                   |                                 |
|   | No Sprint                                   | Sprint 1             | Sprint 2                          | Sprint 3                        |
|   | + New Task                                  | Task 1               | Task 4                            | Task 6                          |
|   | Tesk 8                                      | Task 2               | Task 5                            | Task 7                          |
|   | Task 9                                      | Task 3               |                                   |                                 |

 To see Sprint Progress for a Current Sprint, click on the Sprints Tab and choose Sprint -> Current Sprint. Set % Complete for the Not Started, Next Up, and In Progress Columns.



- 9. You can move tasks around within these Columns. Once a task is done, move it to the *Done* Column and it will be marked as completed.
- To see all tasks (not only in the current Sprint), click on the Task Board tab, and then choose Task Board.



## Navigate in Project Online with Only Your

you

#### Keyboard

The following table lists keyboard shortcuts for Project Online:

| Action                   | Shortcut                   |
|--------------------------|----------------------------|
| Move the selection       | Alt+J                      |
| between the links on     |                            |
| the top link bar.        |                            |
| Move the selection       | Alt+W                      |
| from one Web Part to     |                            |
| the next Web Part on     |                            |
| pages that use           |                            |
| multiple Web Parts.      |                            |
| Expand drop-down         | Alt+Down arrow key         |
| lists.                   |                            |
| Move to the next cell    | Right arrow key or Tab key |
| or row.                  |                            |
| Move to the previous     | Left arrow key or          |
| cell or row.             | Shift+Tab                  |
| Move up.                 | Up arrow key               |
| Move down.               | Down arrow key or Enter    |
| Go to the URL in the     | Enter                      |
| selected cell.           |                            |
| Move to cell header.     | Ctrl+Y                     |
| Remove focus from        | Esc                        |
| the selected cell.       |                            |
| Move to the last cell or | Ctrl+End                   |
| row.                     |                            |
| Move to the first cell   | Ctrl+Home                  |
| or row.                  |                            |
| Toggle row highlight.    | Ctrl+Spacebar              |
| Expand a drop-down       | Ctrl+Spacebar              |
| menu in a cell header    |                            |
| Expand or collapse a     | Ctrl+Spacebar              |
| grouping.                |                            |
| Expand a group.          | Ctrl+Spacebar              |
| Collapse a group.        | Ctrl+Spacebar              |
| Expand or collapse a     | Ctrl+Spacebar              |
| grid element with        |                            |
| children.                |                            |
| Toggle a check box.      | Spacebar                   |
| Open a drop-down         | Alt+Down arrow key         |
| cell.                    |                            |
| Activate Edit Mode for   | F2                         |
| a cell.                  |                            |
| Up one page.             | Page Up                    |
| Down one page.           | Page Down                  |
| Indent selected task.    | Alt+Shift+Right arrow key  |
| Outdent selected task.   | Alt+Shift+Left arrow key   |
| Cancel entry or edit.    | Esc                        |
|                          |                            |

| Copy selection.          | Ctrl+C                            |
|--------------------------|-----------------------------------|
| Cut selection.           | Ctrl+X                            |
| Delete the selected      | Delete or Ctrl+V or Ctrl+Z        |
| data.                    |                                   |
| Delete a row.            | Ctrl+Delete                       |
| Move to the first field  | Home                              |
| in a row.                |                                   |
| Move to the first row.   | Ctrl+Up arrow key                 |
| Move to the last field   | End                               |
| in a row.                |                                   |
| Move to the last field   | Ctrl+End                          |
| of the last row.         |                                   |
| Move the selected        | Access key+> (Single              |
| items from the source    | right-pointing angle              |
| list to the target list. | quotation mark)                   |
| Move all items from      | Access key+W                      |
| the source list to the   | Access Rey+W                      |
| target list.             |                                   |
| Move all items from      | A cease kovy X                    |
| the target to the        | Access key+X                      |
| source list.             |                                   |
| Move the selected        | Access kovy & (Single left        |
| item from the target to  | Access key+< (Single left-        |
| the source list.         | pointing angle quotation<br>mark) |
| Access the check         | Spacebar                          |
| boxes under the          | Spacebal                          |
| Resource name check      |                                   |
| box.                     |                                   |
| Access the calendar in   | Alt+Down arrow key (for           |
| a table cell.            | example, start date or end        |
|                          | date)                             |
| Move to the next         | Alt+> (Single right-              |
| month.                   | pointing angle quotation          |
|                          | mark)                             |
| Move to the previous     | Alt+< (Single left-pointing       |
| month.                   | angle quotation mark)             |
| > (Single right-         | Alt+A                             |
| pointing angle           |                                   |
| quotation mark)          |                                   |
| >> (Right-pointing       | Alt+W                             |
| double angle             |                                   |
| quotation mark)          |                                   |
| << (Left-pointing        | Alt+X                             |
| double angle             |                                   |
| quotation mark)          |                                   |
| < (Single left-pointing  | Alt+O                             |
| angle quotation mark)    |                                   |
| angle quotation mark)    |                                   |