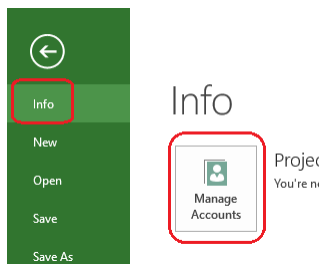


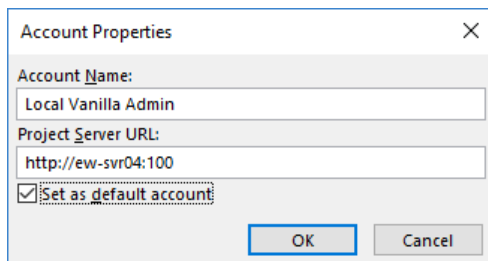
## Before Starting Your First Project

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

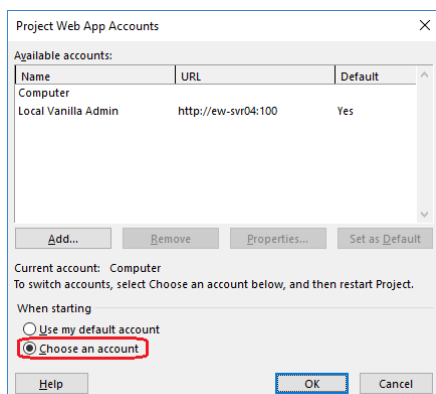
1. Open Microsoft Project 2016.
2. When the application has opened, press the **Esc** key on your keyboard.
3. Click on the **File** tab in the upper left corner.
4. On the Info tab click the **Manage Accounts** button.



5. 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**.



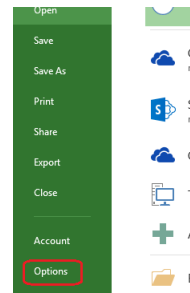
6. Select the **Choose an account** option and click **OK**.



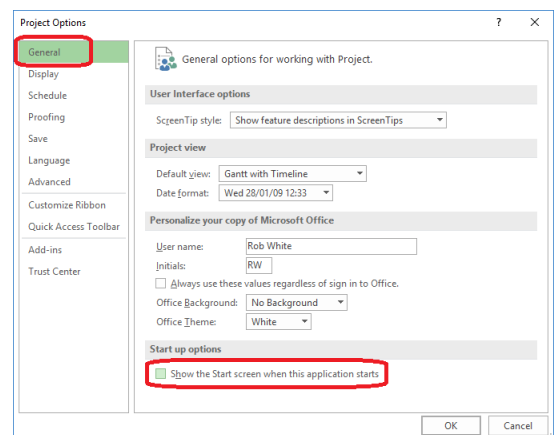
7. Close Microsoft Project 2016.

## Set application default options

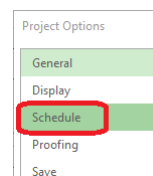
1. Open Microsoft Project 2016. Click **OK** on the login dialog.
2. When the application has opened, press the **Esc** key on your keyboard.
3. Click on File tab in the upper left corner.
4. Click **Options** to open the Project Options dialog.



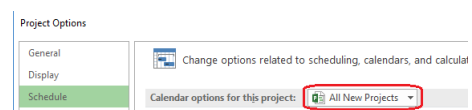
5. In the **General** tab uncheck "Show the Start screen when this application starts".



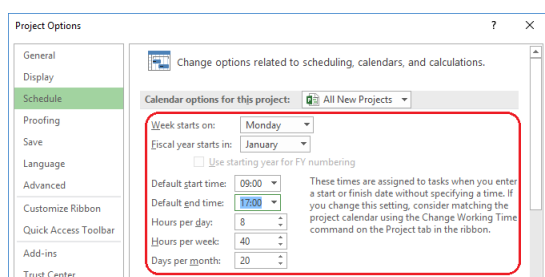
6. Select the **Schedule** tab.



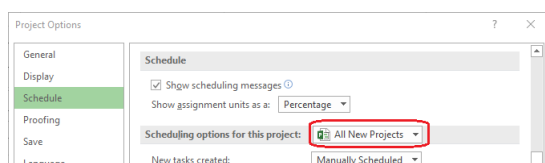
7. Select **All New Projects** from the Calendar options for this project dropdown.



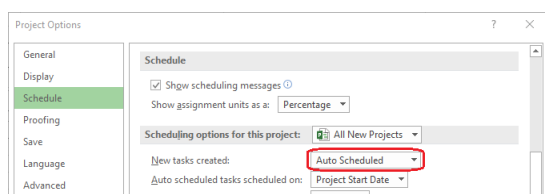
- Set the calendar options for your organization.



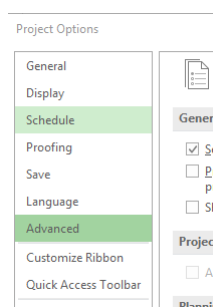
- Select **All New Projects** from the Scheduling options for this project dropdown.



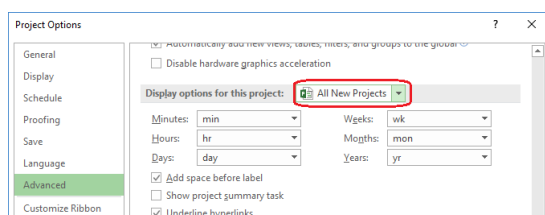
- Select **Auto Scheduled** from the New tasks created dropdown.



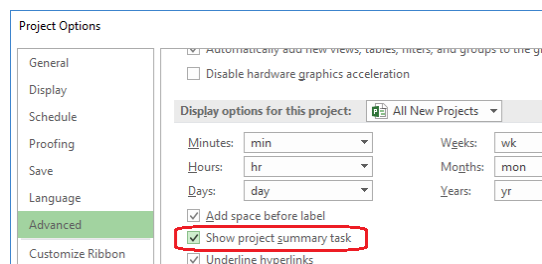
- Select the **Advanced** tab.



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



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



- Click **OK**.
- Close Microsoft Project.

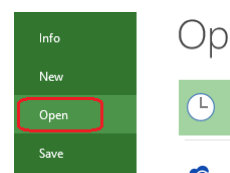
## Starting Your First Project

### Create a new project

- Open Microsoft Project 2016.
- Upon opening, Project will automatically set you up with a blank project.

### Open a project from an existing file

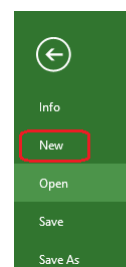
- Open Microsoft Project 2016.
- Click on **File** in the upper left corner.
- Click on **Open**.



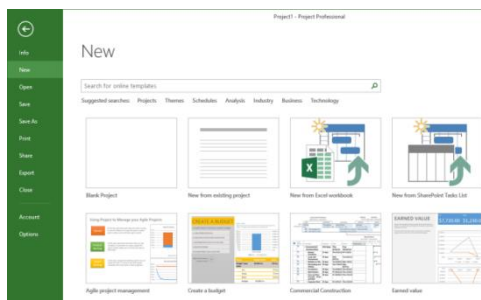
- Select the appropriate folder and file and click **Open**.

### Open a Project from a template

- Open Microsoft Project 2016.
- Select the **File** tab.
- Select the **New** menu item and click on the template icon.

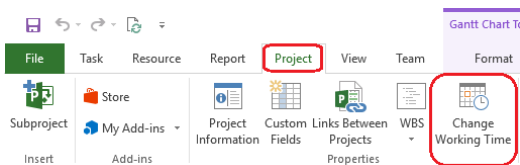


- Select and download your template.

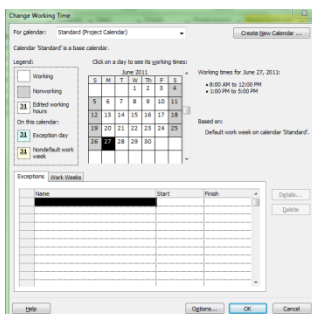


## Adjust the Calendar

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

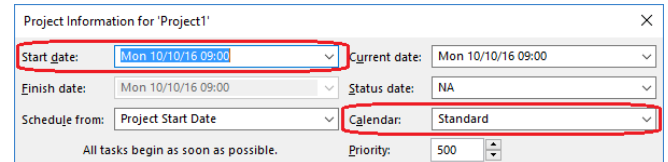


- Once the Change Working Time dialog box opens, you will view the Standard Calendar.
- To set a holiday as a non-working day, click on the **Holiday Date**. Click in an **Open Exception** line at the bottom. Enter the holiday name. Click **Enter**. Recurring holidays may be entered by clicking **Details**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



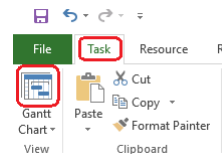
## Set the Project Start Date and apply the Project Calendar

- Click the **Project** tab, then click **Project Information**.
- Enter the project Start Date.
- Select the project **Calendar** and click **OK**.

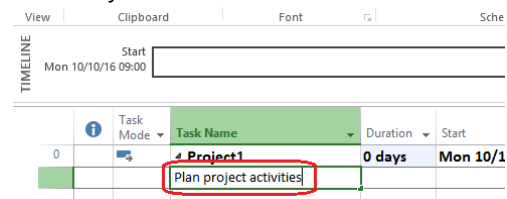


## Create Tasks

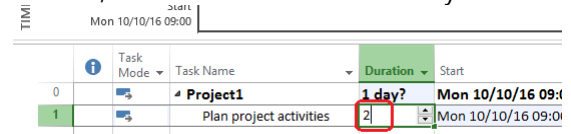
- Ensure the Gantt Chart view is active by selecting the **Task** tab on the ribbon and clicking the **Gantt Chart** button.



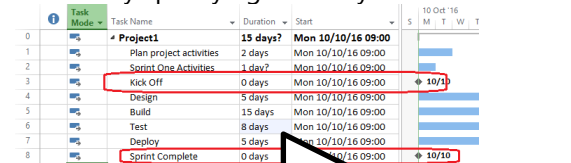
- Click in the **Task Name** cells of the first empty task row and enter the name for the task / summary task.



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



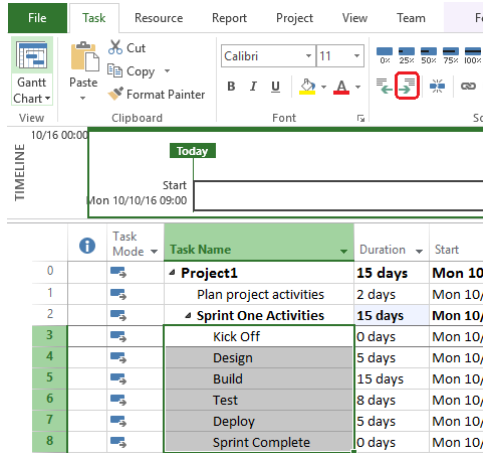
- Create additional tasks and milestones as required for your project. Milestones are created by specifying zero days of duration.



**Tip:** Keep your duration in the same units (e.g. days)

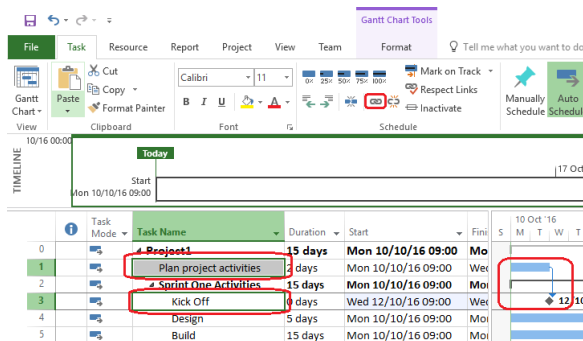
## Creating a WBS / Outline Structure

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

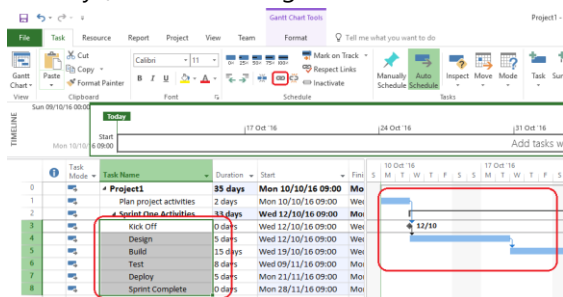


## Create Task Dependency Relationships

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



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.

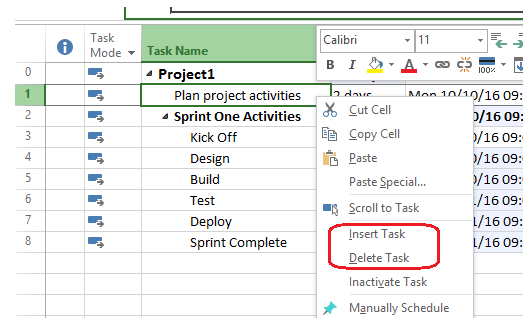
## Inserting and Deleting Tasks

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**.

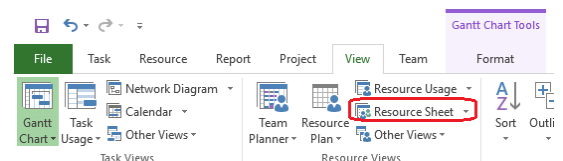


**Tip:** Pressing the **Del** key will remove the contents of the selected cell; it does not delete the task.

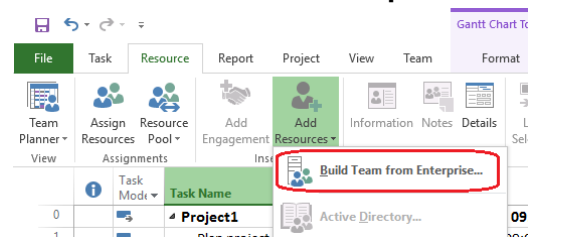
## Working with Resources

### Build a team using enterprise resources

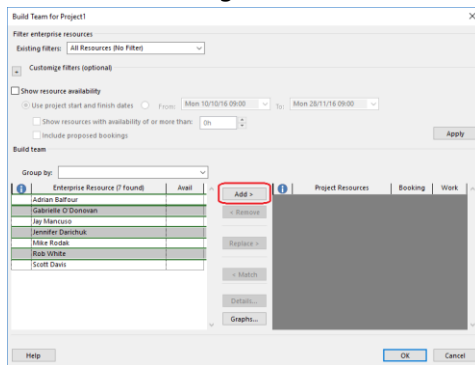
- With Microsoft Project open, click on the **View** tab on the ribbon bar and select **Resource Sheet** under Resource Views.



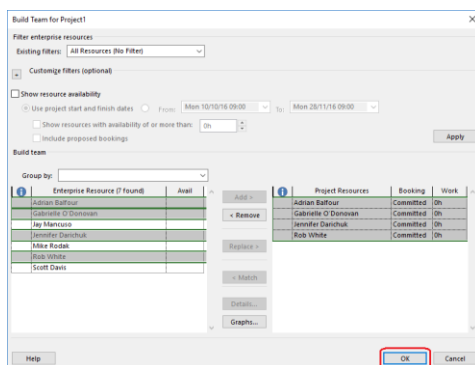
- Click on the **Resource** tab on the ribbon, select **Add Resources** under Insert, and choose **Build Team from Enterprise**.



- 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.
- Press the **Add** button to move the selected resources to the right side list.

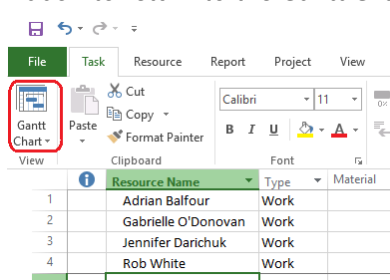


- Select additional resources if required and then click **OK**.



## Assign resources to tasks

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



- Click in the Resource Names cell of a task you wish to assign and click the **dropdown arrow**. Select the resource / resources you wish to assign to the task.

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	
Sprint One Activities	33 days	Wed 12/10/16 09:00	
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	
Test	8 days	Wed 09/11/16 09:00	
Deploy	5 days	Mon 21/11/16 09:00	

Alternatively, you can type resource names directly into the Resource Names 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	
Sprint One Activities	33 days	Wed 12/10/16 09:00	Adrian Balfour, Gabrielle O'Donovan
Kick Off	0 days	Wed 12/10/16 09:00	

## View all Task and Resource assignments for a Project

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

Task Name	Work	Details	S	M	T
Project1	32 hrs	Work		16h	16h
Plan Project Activities	32 hrs	Work		16h	16h
Adrian Balfour	16 hrs	Work		8h	8h
Gabrielle O'Donovan	16 hrs	Work		8h	8h
Sprint One Activities	0 hrs	Work			

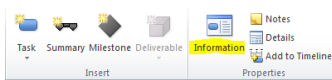
- To view task assignments for resources, click the **Resource Usage** button on the View ribbon.

Resource Name	Work	Details	S	M	T	W
Unassigned	0 hrs	Work				
Kick Off	0 hrs	Work				
Design	0 hrs	Work				
Build	0 hrs	Work				
Test	0 hrs	Work				
Deploy	0 hrs	Work				
Sprint Complete	0 hrs	Work				
Adrian Balfour	16 hrs	Work		8h	8h	
Plan Project Activities	16 hrs	Work		8h	8h	
Gabrielle O'Donovan	16 hrs	Work		8h	8h	
Plan Project Activities	16 hrs	Work		8h	8h	
Jennifer Darichuk	0 hrs	Work				
Rob White	0 hrs	Work				

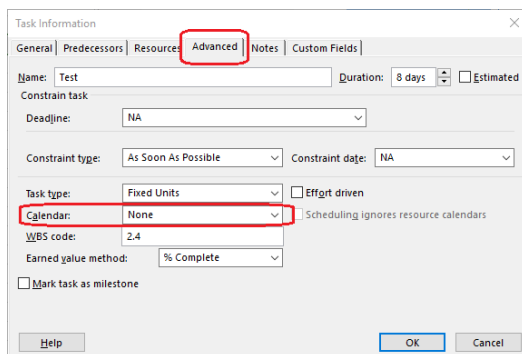
## Assign a Calendar to a Task

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

1. 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.

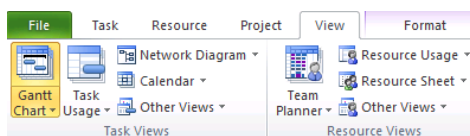


5. Click **OK**.

## 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.

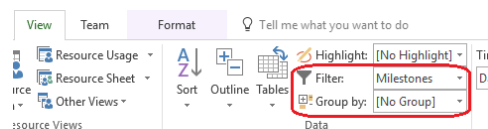


**Tip:** Add Key Milestones to the Timeline View

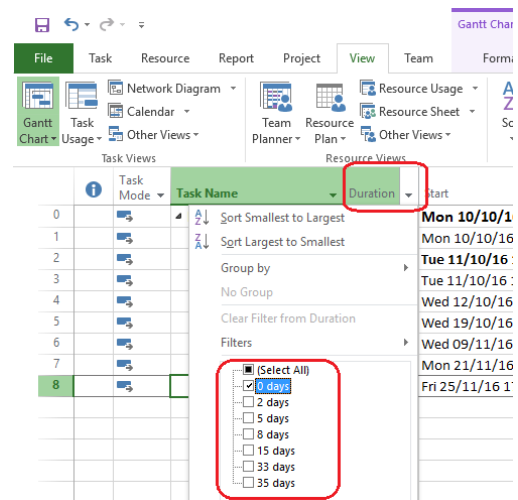
The default view in Project 2016 is a combination of the Gantt Chart view with the Timeline view layered above it. In the Gantt Chart click the task or milestone you want to add to the Timeline view. Right-click the milestone and click Add to Timeline.

## Change the Way the Data is Viewed

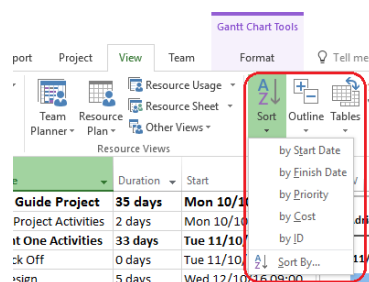
1. You can apply predefined filters and grouping to the view by using the **Filter** and **Group By** dropdowns in the Data section.



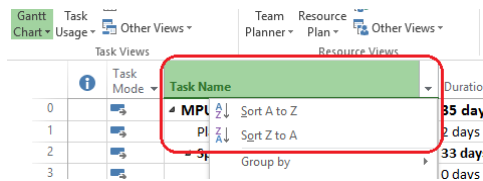
2. You can also filter a view using the quick filter for one or more columns. Click the **down arrow** in the column header to show filter options.



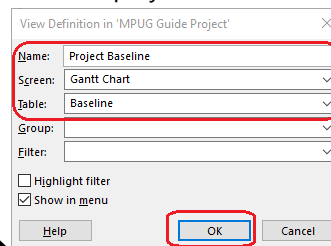
3. To sort a view, select a sort order from the **Sort** dropdown on the View ribbon tab.



- Alternatively, sort using the column dropdown menu.

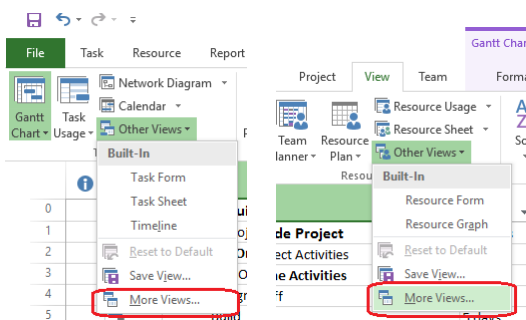


- When the view definition dialog box opens, name your new view, select the **Screen** (type of view) you want displayed, and (when appropriate) the table to be displayed, then click **OK**.



## 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.

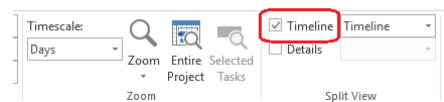


**Tip:** The best view to see slippage between baseline and actual work is the Detail Gantt view

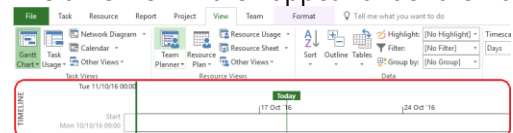
[www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/](http://www.mpug.com/articles/ask-the-experts-15-microsoft-project-tips-for-new-users/)

## Add a Timeline

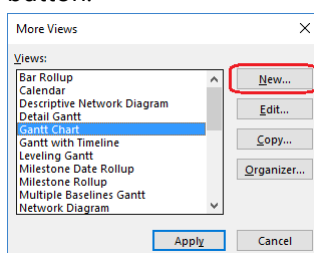
- To view the timeline, check the **Timeline** option on the ribbon's View tab.



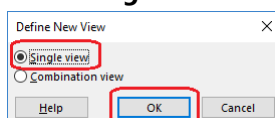
- The timeline will then appear under the ribbon.



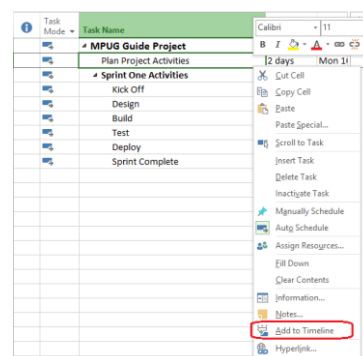
- When the dialog box opens, click on the **New** button.



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

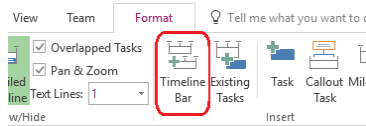


- To add a task or milestone to the timeline, right click it (in the Gantt Chart view) and select **Add to Timeline**.





- 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 the Format ribbon is context-sensitive, so ensure the Timeline view has the focus by clicking in it.



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

**Tip:** Check out the MPUG article on the new multiple timeline feature at

[www.mpug.com/articles/microsoft-project-2016-preview-multiple-timelines/](http://www.mpug.com/articles/microsoft-project-2016-preview-multiple-timelines/)



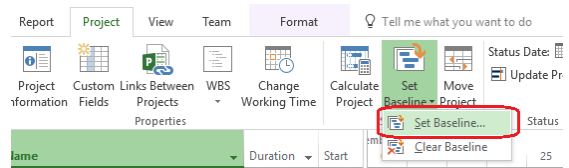
## Managing a Project

**Tip:** There are 11 sets of baseline fields in the system, Baseline and Baselines 1-10. The Baseline fields are the default used when you first set a baseline. When a baseline is updated, you may optionally select one of the other 10 sets of Baseline fields or update the current Baseline fields.

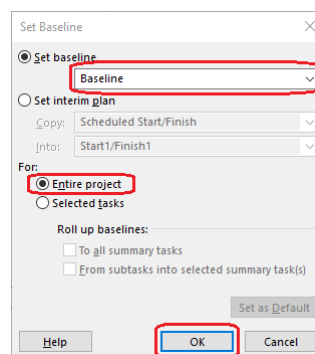
### Set a Baseline

- With Microsoft Project open, select the **Project** tab.

- Under the Schedule section, click on **Set Baseline**.

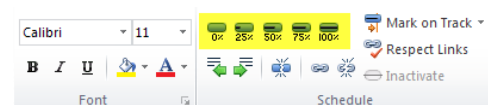


- The Set Baseline dialog box will open. Select the **Baseline** you wish to set.
- Select whether the Baseline will be for the Entire Project or just for Selected Tasks. Click **OK**.

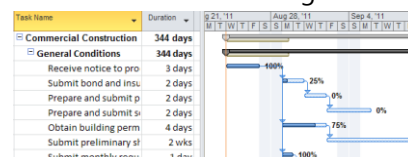


## Enter Progress Using Percent Complete

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



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



**Tip:** % Complete represents the percentage of task duration that's complete. % Work Complete is the percentage of task work hours that are complete. And 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.

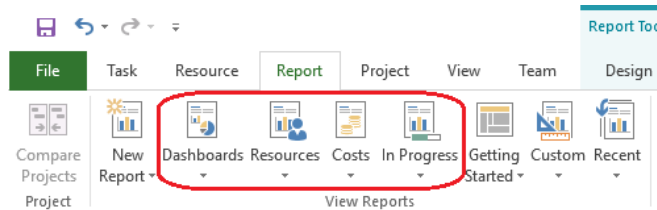
See: [www.mpug.com/articles/Certification-Insider-Tracking-Project-Progress/](http://www.mpug.com/articles/Certification-Insider-Tracking-Project-Progress/)

## Reporting

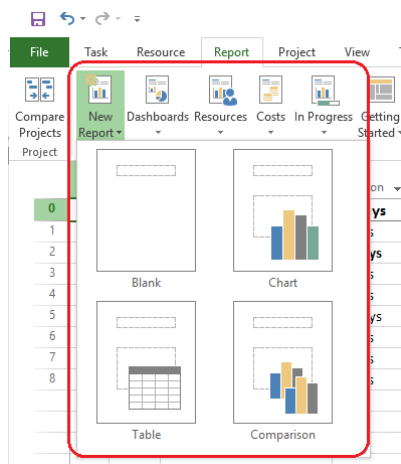
### Create a Project Report

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**.

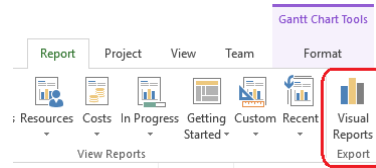


- To create a new report, select the report style from the **New Report** dropdown.

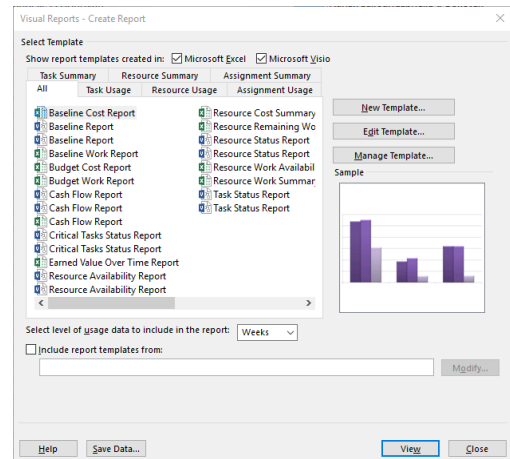


### Create a Visual Report

- Click on **Visual Reports**, under the Project tab.



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



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

### Microsoft Project Keyboard Shortcuts

Action	Shortcut
Show field settings dialog box	Alt + F3
Close Project help window	Alt + F4
Move to end of project	Alt + End
Create new project	Ctrl + N
Open project	Ctrl + O
Save project	Ctrl + S
Insert new task	Insert
Assign resources box	Alt + F10
Close an active project window	Ctrl + W
Switch to next project window	Ctrl + F6
Maximize project window	Ctrl + F10
Remove all tasks filters	F3
Calculate project	F9
Move to beginning of project	Alt + Home
Copy picture of selected window to Clipboard	Alt + Print Screen
Hide subtasks	Alt + Shift + -
Show all tasks	Alt + Shift + *
Show subtasks	Alt + Shift + =
Outdent task	Alt + Shift + Left Arrow
Indent task	Alt + Shift + Right Arrow
Switch to previous window	Alt + Shift + Tab
Activate control menu	Alt + Spacebar   Alt + Hyphen
Next window	Alt + Tab
Move between tasks	Arrow Keys
Move to end of text box	Ctrl + End
Link selected tasks	Ctrl + F2
Restore size of active window after maximizing it	Ctrl + F5   Ctrl + F10

Switch to next window in multiple open windows	Ctrl + F6
Turn auto calculate on or off	Ctrl + F9
Fill down	Ctrl + D
Open "Find" dialog box	Ctrl + F
Open "Go To" dialog box	Ctrl + G
Insert hyperlink	Ctrl + K
Paste	Ctrl + V
Cut	Ctrl + X
Undo	Ctrl + Z
Add object to multi-section	Ctrl + Click
Move to beginning of text box	Ctrl + Home
Move one word to right	Ctrl + Right Arrow
Move one word to left	Ctrl + Left Arrow
Change task to "Auto Schedule"	Ctrl + Shift + A
Unlink selected tasks	Ctrl + Shift + F2
Switch to previous window	Ctrl + Shift + F6
Change task to "Manually Schedule"	Ctrl + Shift + M
Select current column	Ctrl + Spacebar
Jump to first row / last row	Ctrl + Up/Down Arrow
Close active project window	Ctrl + W or Ctrl + F4
Open project help window	F1
Edit task	F2
Remove column filters (when active)	F3
Spellcheck	F7
Extend selection mode	F8
Save as	F12
Jump to first / last cell in row	Home / End
Insert new task	Insert
Open task information dialog box	Shift + F2
Activate split bar	Shift + F6
Shortcut menu	Shift + F10

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## NEW MPUG Learning Paths!

MPUG has created three new learning paths for project managers, developed with **YOU** in mind, addressing your specific training needs!

### Beginner

### Intermediate

### Expert

#### The Beginner Course Path Covers:

- Getting Started with Project Management
- What Is a Project?
- What Is Project Management?
- Who are Project Managers?
- Getting Started with Microsoft® Project and the Microsoft® Toolset
- Defining the Project Plan
- Creating a Project Plan
- Creating Tasks and Dependencies
- Controlling a Project Plan
- Tracking your project
- Managing Project Resources
- Reporting on Projects

#### The Intermediate Course Path Covers:

- Exploring the new features of Project
- Best Practices for using MSP Professional and Project Web App
- PMI® Practice Standards for WBS and Scheduling
- Resource Leveling, Baselining and Status Input
- Weekly Status Updates and Reporting
- Deep Dive with MSP Features Expert Desktop Essentials: Timeline View, Macros, SharePoint Integration with Project, Resource Management and more!
- Meijer Case Study: Planning, Implementing, Tracking, and Lessons Learned.

#### The Expert Course Path Covers:

- Identifying Inappropriate Practices in Schedules
- Avoiding Recurrence of Bad Practices
- Enterprise Adoption Strategy for Project
- Best Practices for Immediate Usage
- Aligning Strategy to Portfolio Management Processes and Value Proposition
- Portfolio Planning
- Governance
- Risk Management
- Resource Management
- Sustaining and Embedding Strategy
- Leading Project Migrations

See more at [mpug.com/mpug-learning-paths-for-project-managers/](http://mpug.com/mpug-learning-paths-for-project-managers/)