WELCOME!

GET READY:

1. Open up Microsoft Project

2. In a browser, navigate to: bit.ly/txstproject

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INTRODUCTION TO

MS PROJECT

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Texas State University Library Staff Professional Development

May 3, 2019

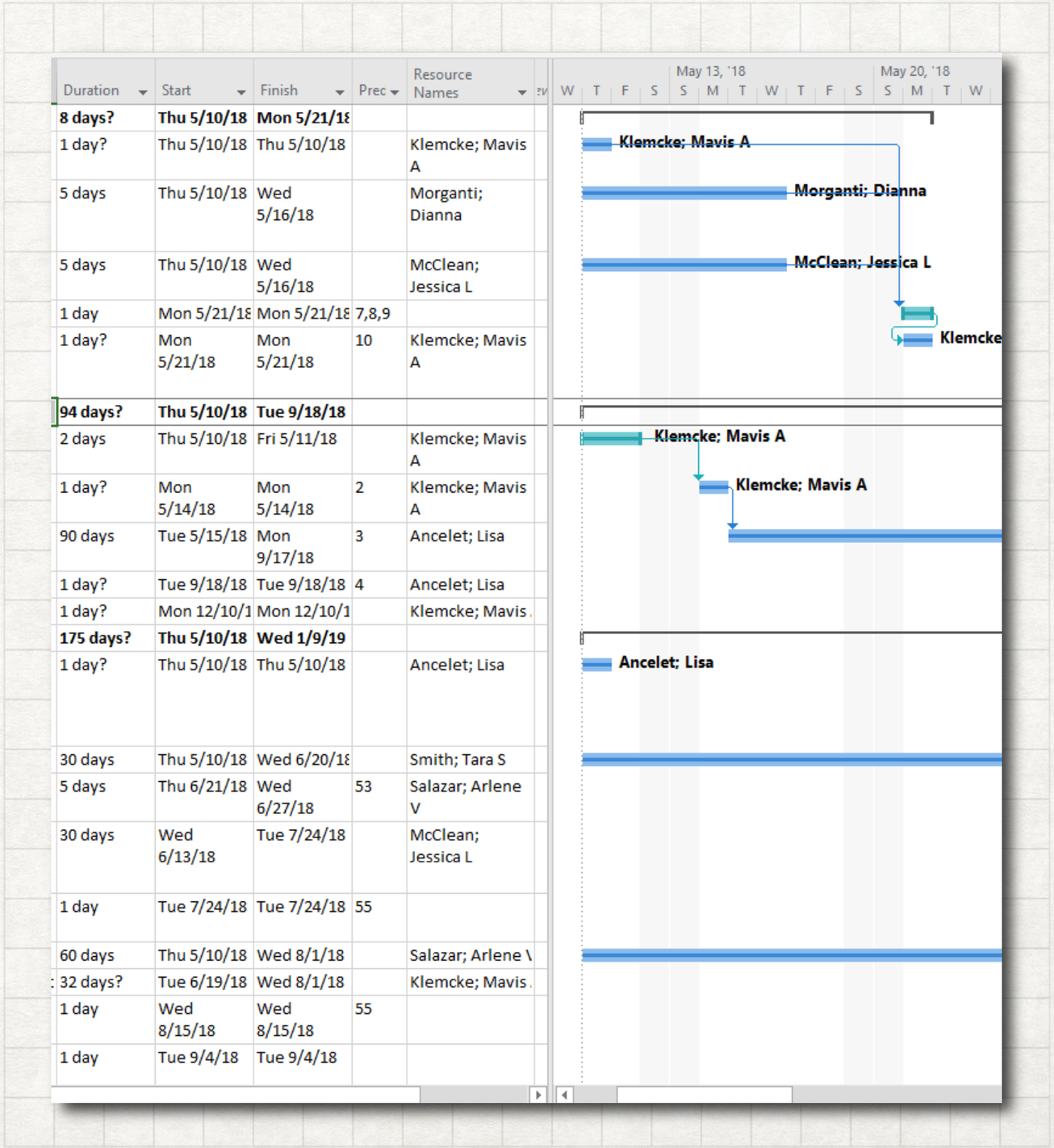
MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

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



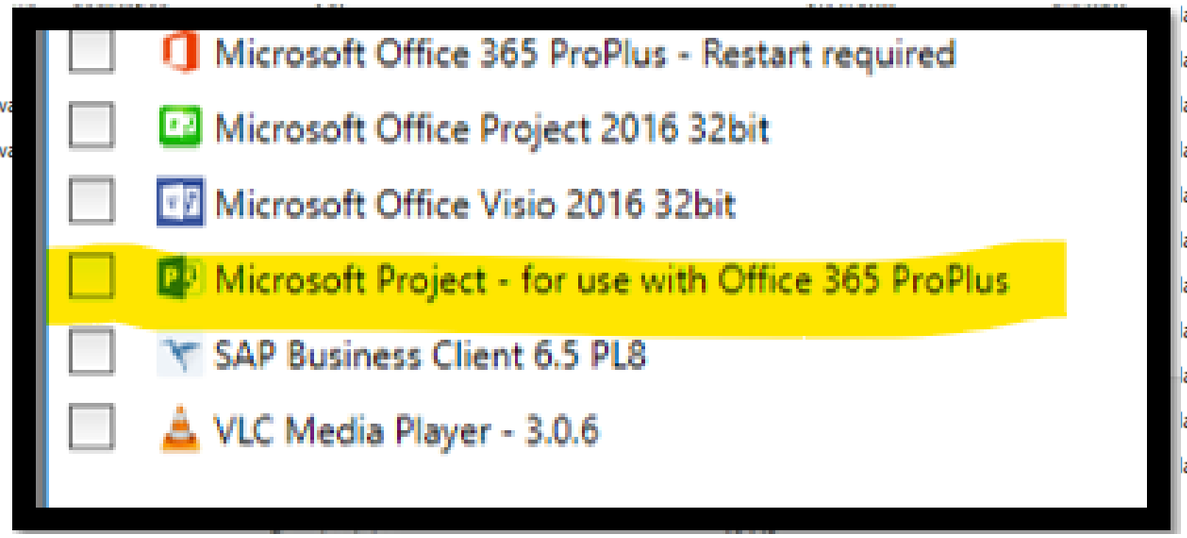
DOWNLOADING MS PROJECT

SOFTWARE CENTER

Available Software | Installation Status | Installed Software | Options

SHOW: All — Show optional software

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



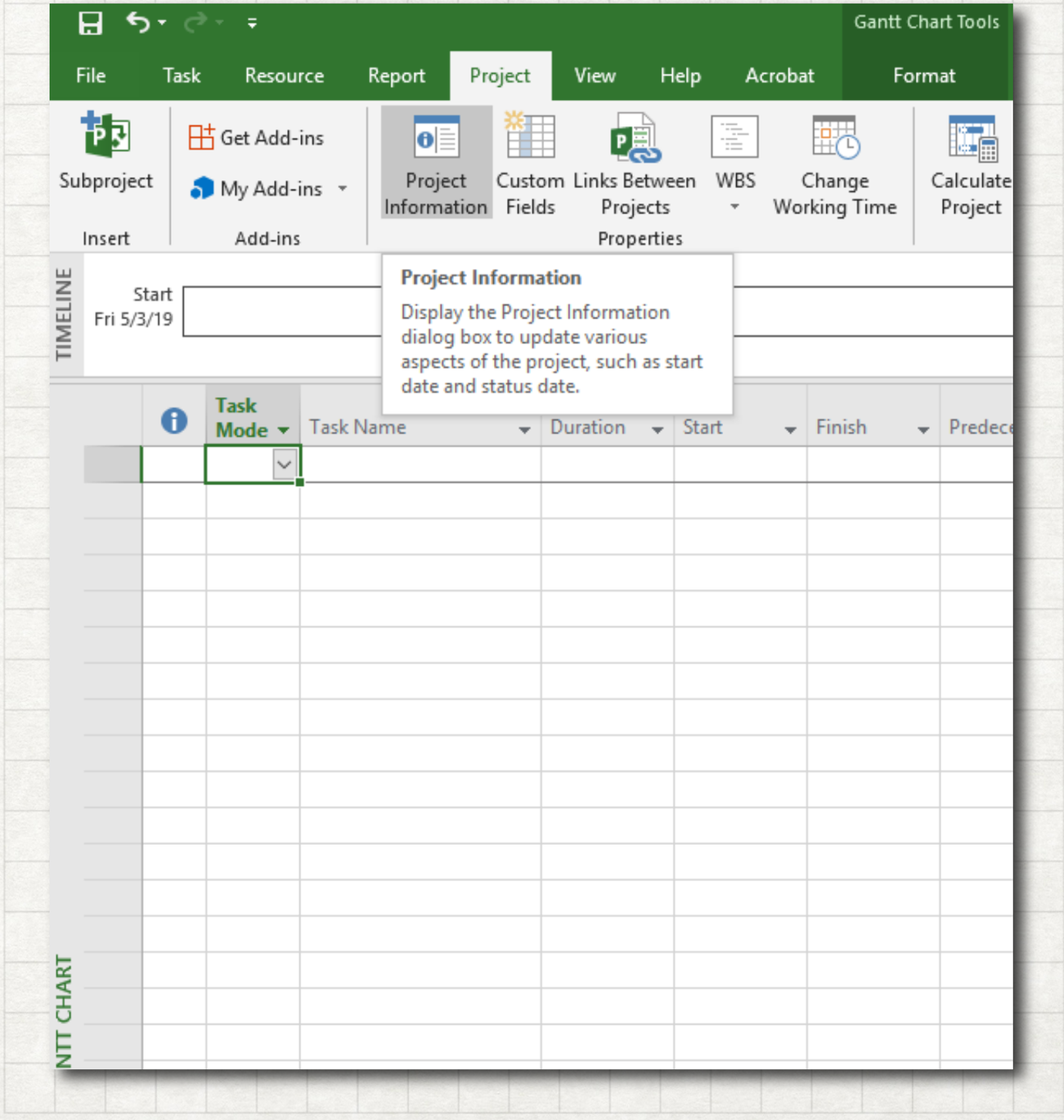
Display Fusion v7.1

OVERVIEW		REQUIREMENTS		DESCRIPTION
Status:	Available	Restart required:	Might be required	
Version:	7.1	Download size:	13 MB	
Date published:	Not specified	Estimated time:	9 minutes	
Help document:	None	Total components:	1	

CREATING A NEW PROJECT

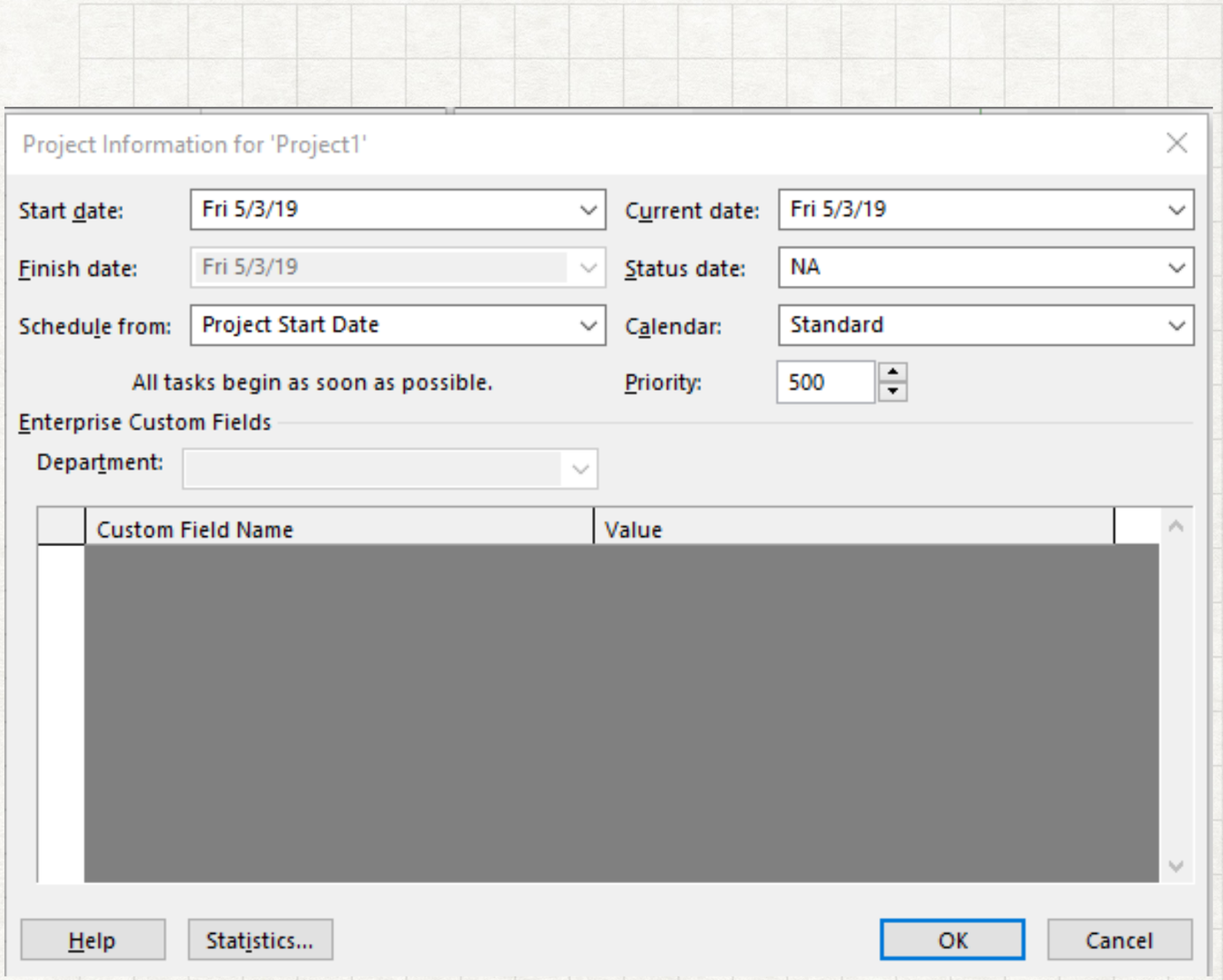
ENTERING PROJECT INFORMATION

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



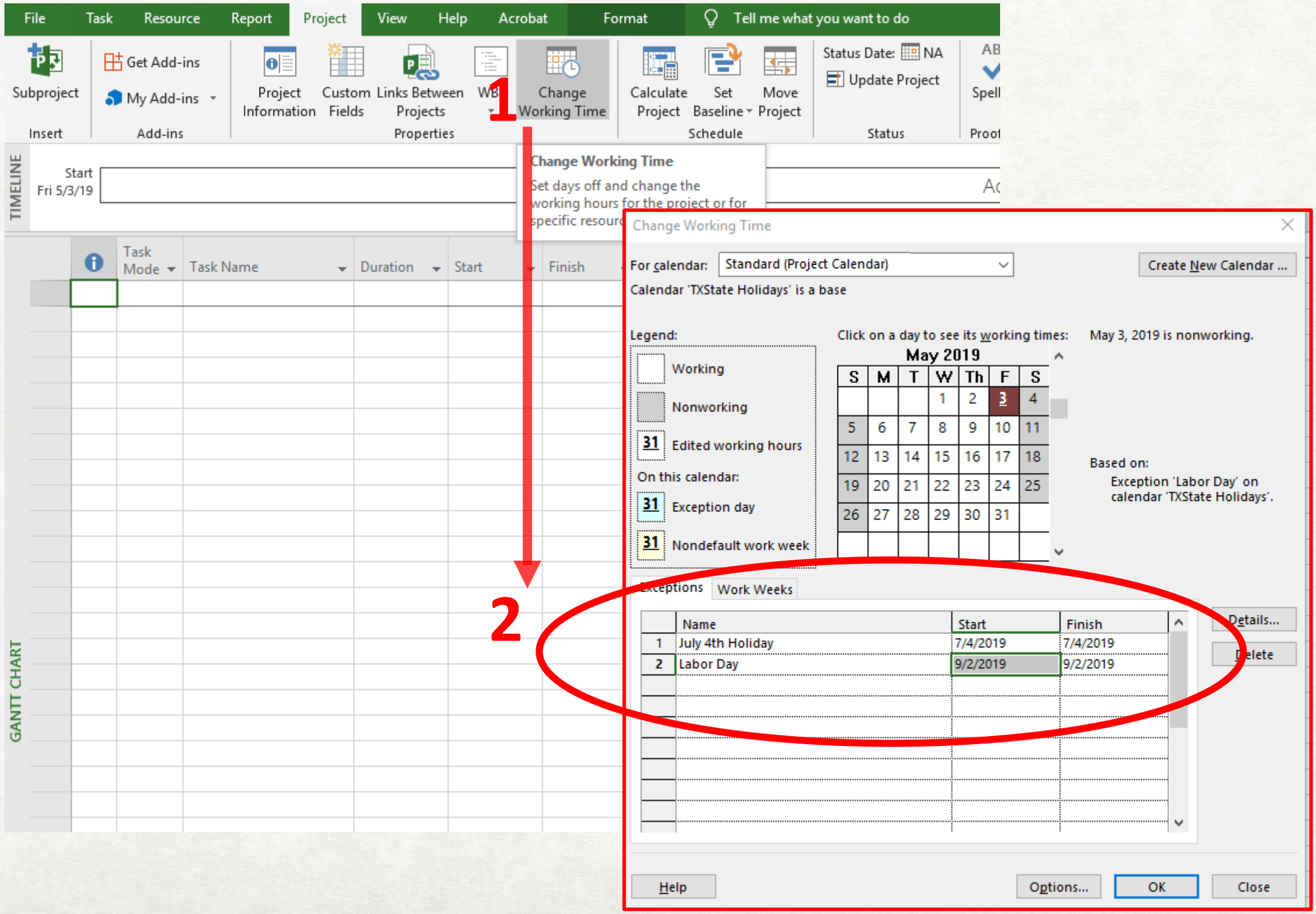
ENTERING PROJECT INFORMATION

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



CALENDARS

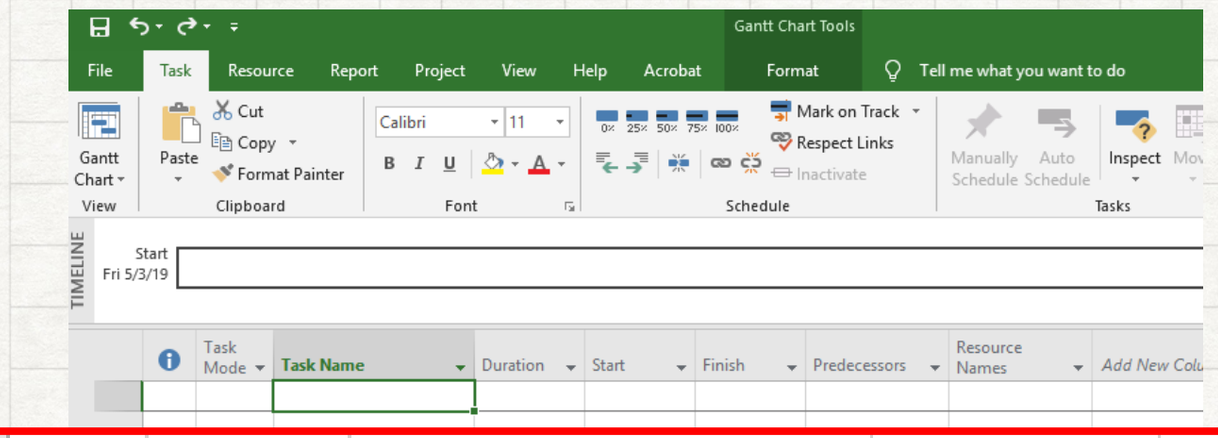
PRACTICE ADDING IN HOLIDAYS

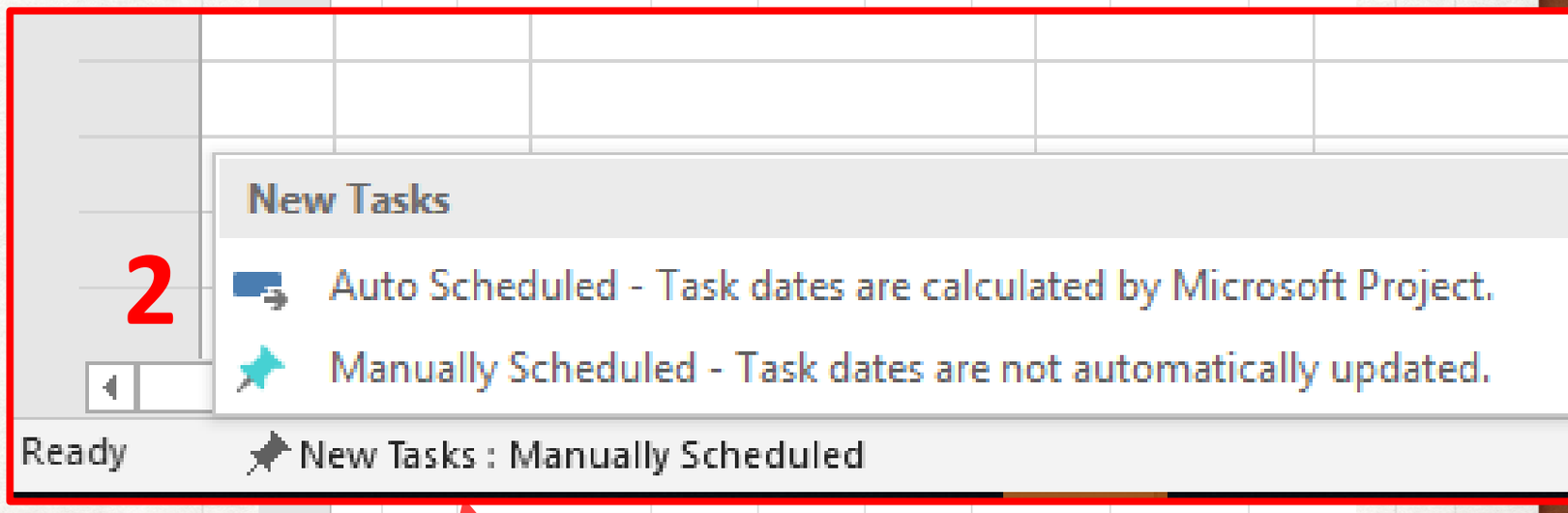


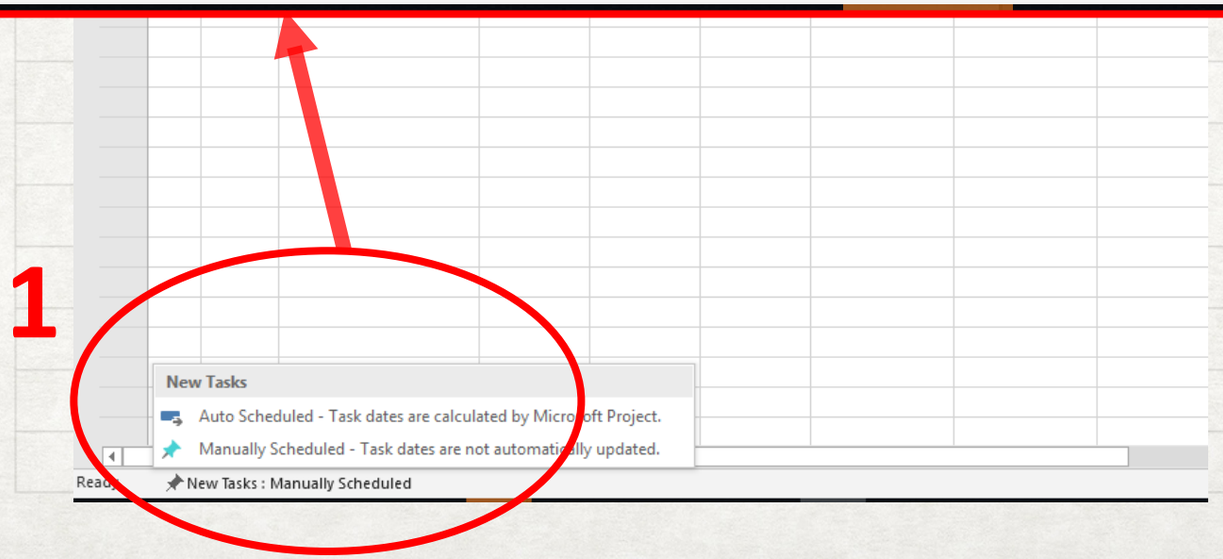
CUSTOMIZING PROJECT

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

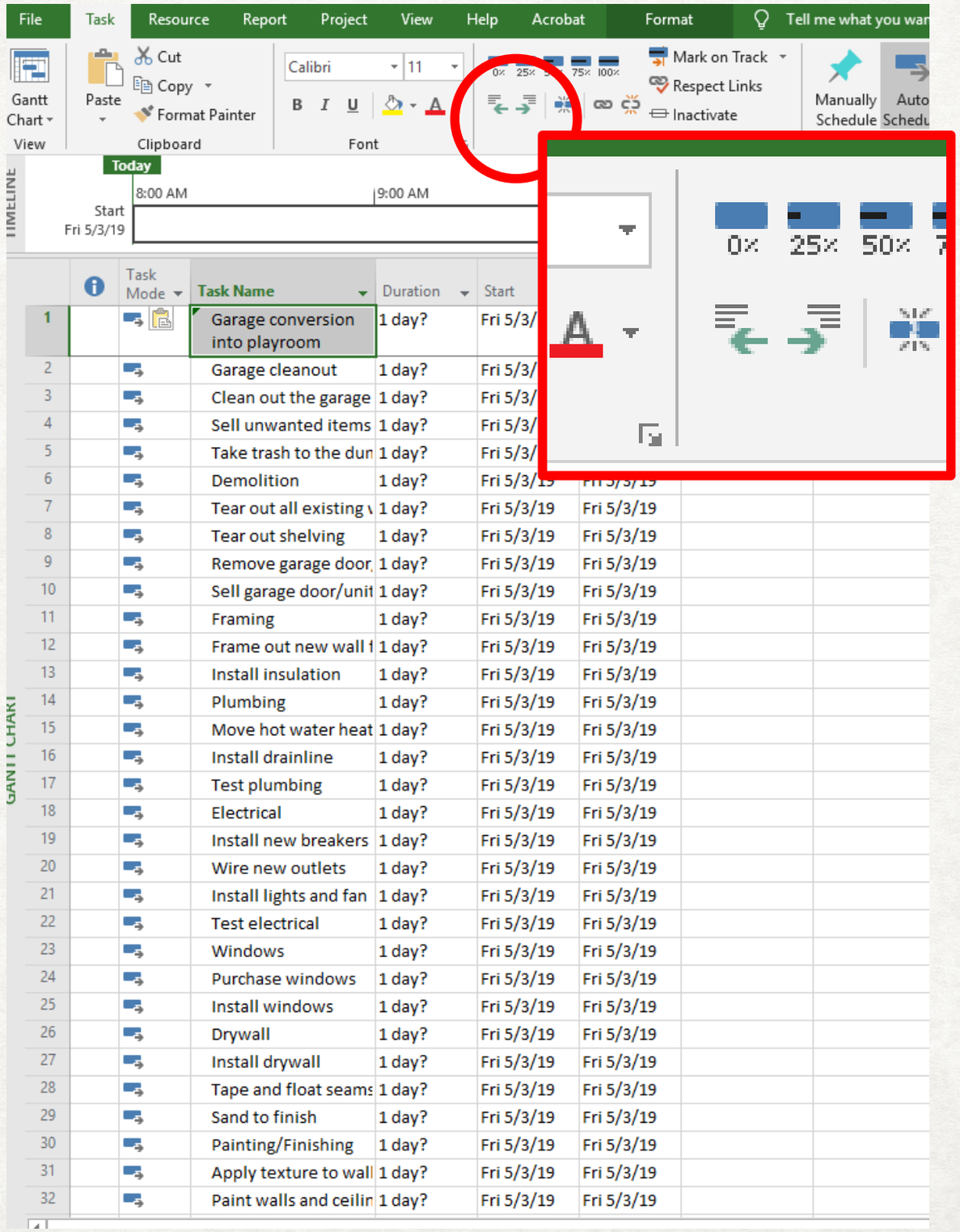
	Duration	Resource
Garage conversion into playroom		
Garage cleanout		
Clean out the garage	2	Homeowner
Sell unwanted items	1	Homeowner
Take trash to the dump	1	Homeowner
Demolition		
Tear out all existing walls	1	Crew
Tear out shelving	1	Crew
Remove garage door/unit	1	Crew
Sell garage door/unit online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



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

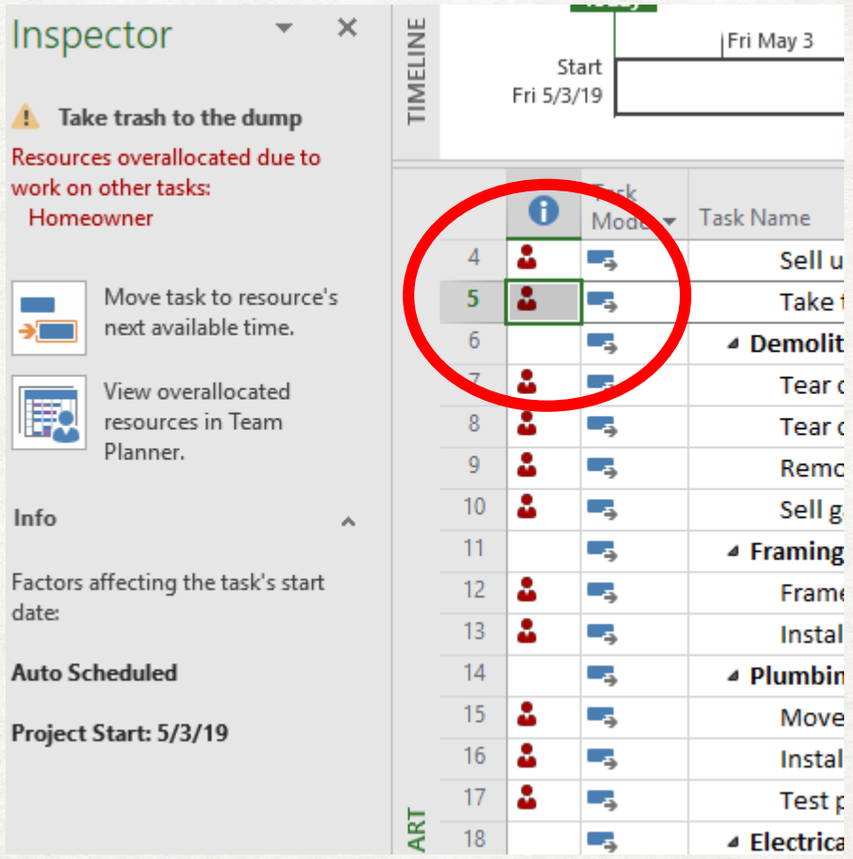
INPUT RESOURCES

- 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.

Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt.	Cost/Use	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

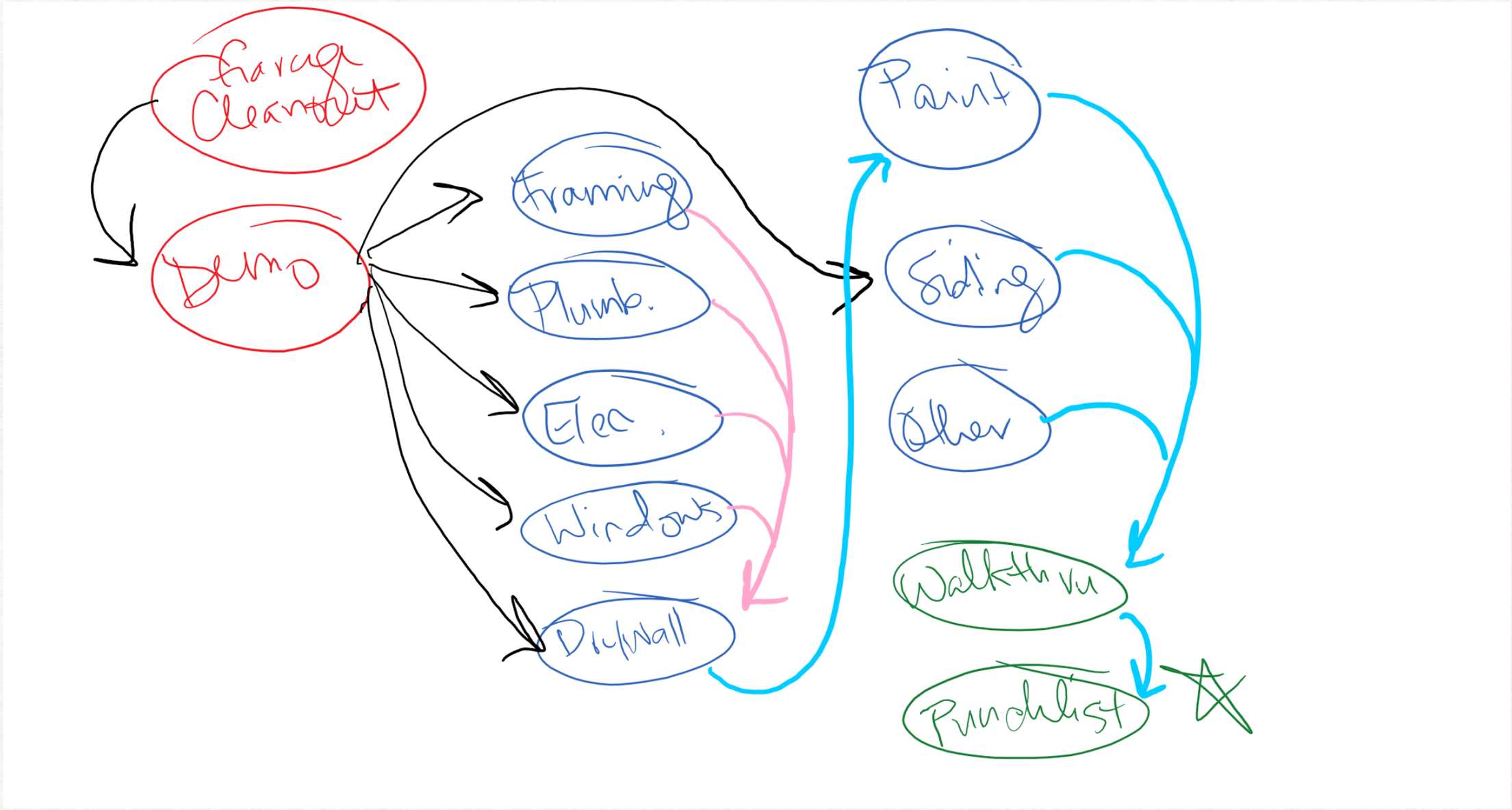
ASSIGN RESOURCES TO THE PROJECT

- 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

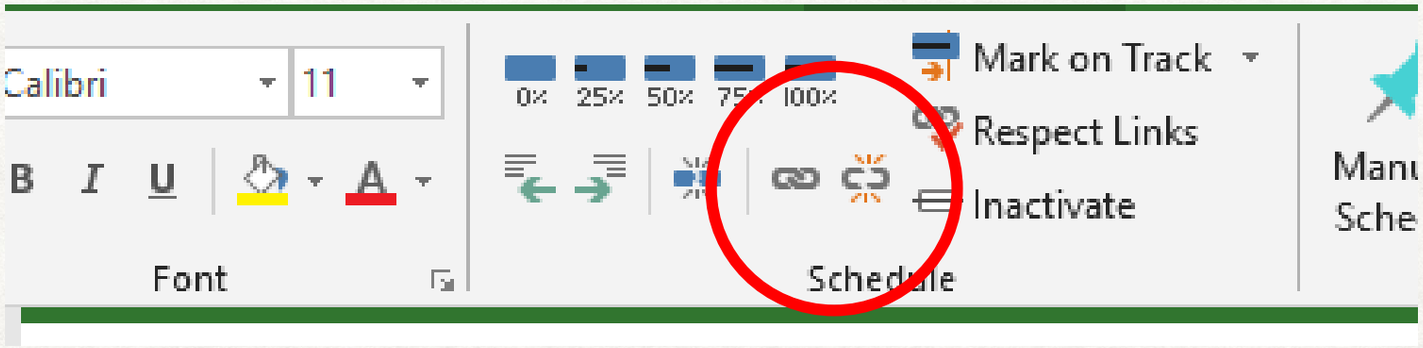
4. Before you can paint/finish, you have to finish drywall
   - Next to task 30, type in predecessor 26

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

	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt.	Cost/Us	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

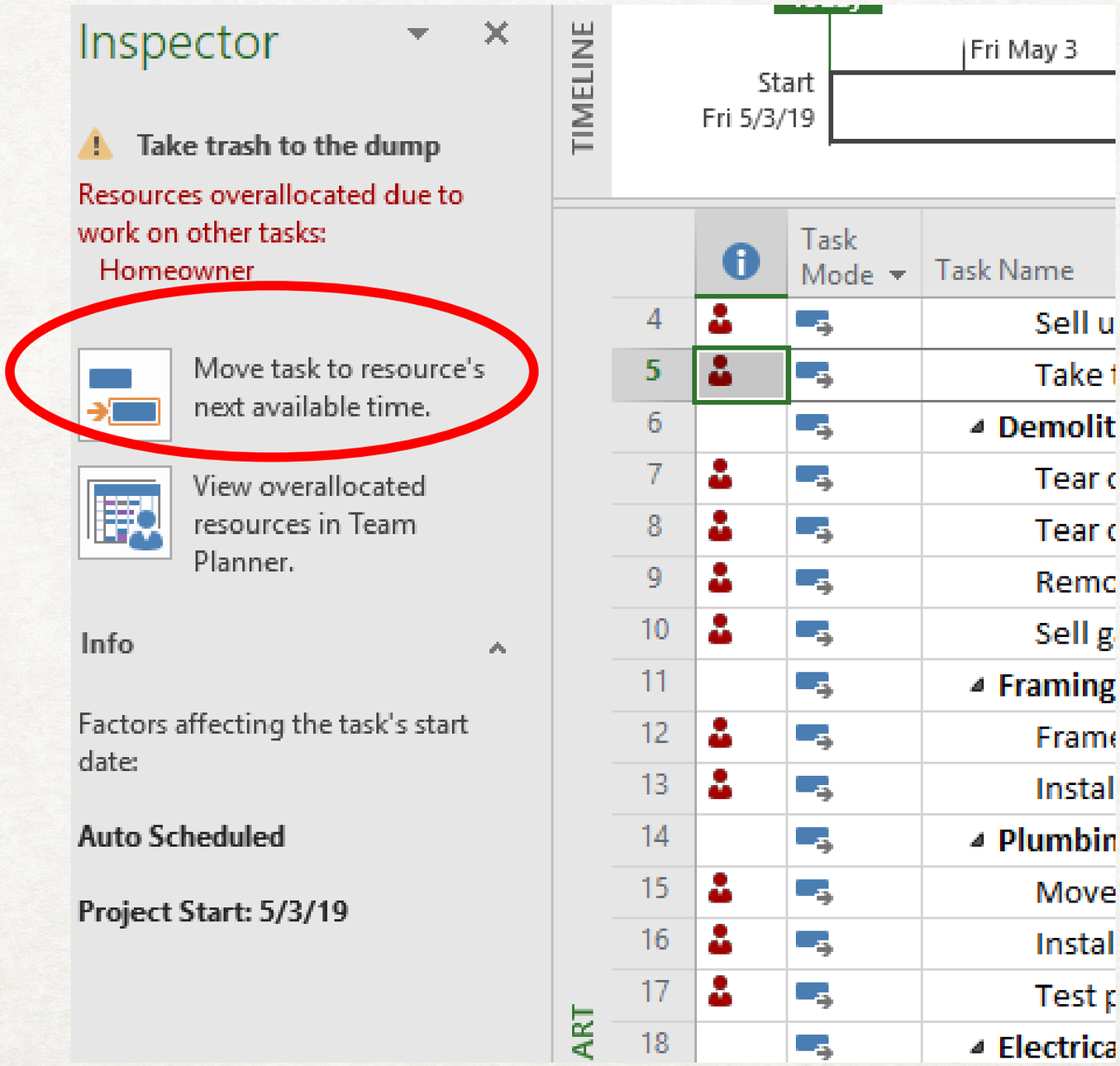
   - Highlight a group and click “link” button”

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”

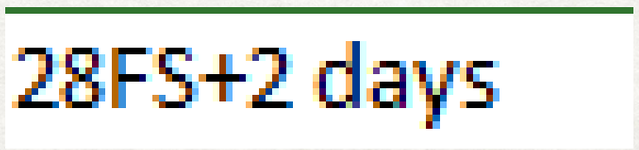


PREDECESSORS AND SUCCESSORS

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.



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

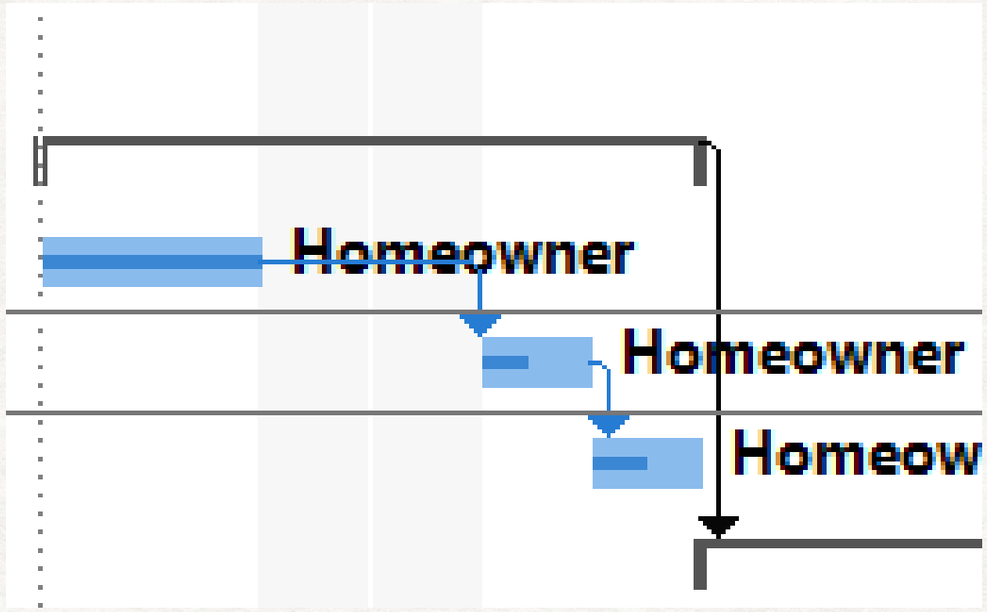
TRACKING AND REPORTING

- 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

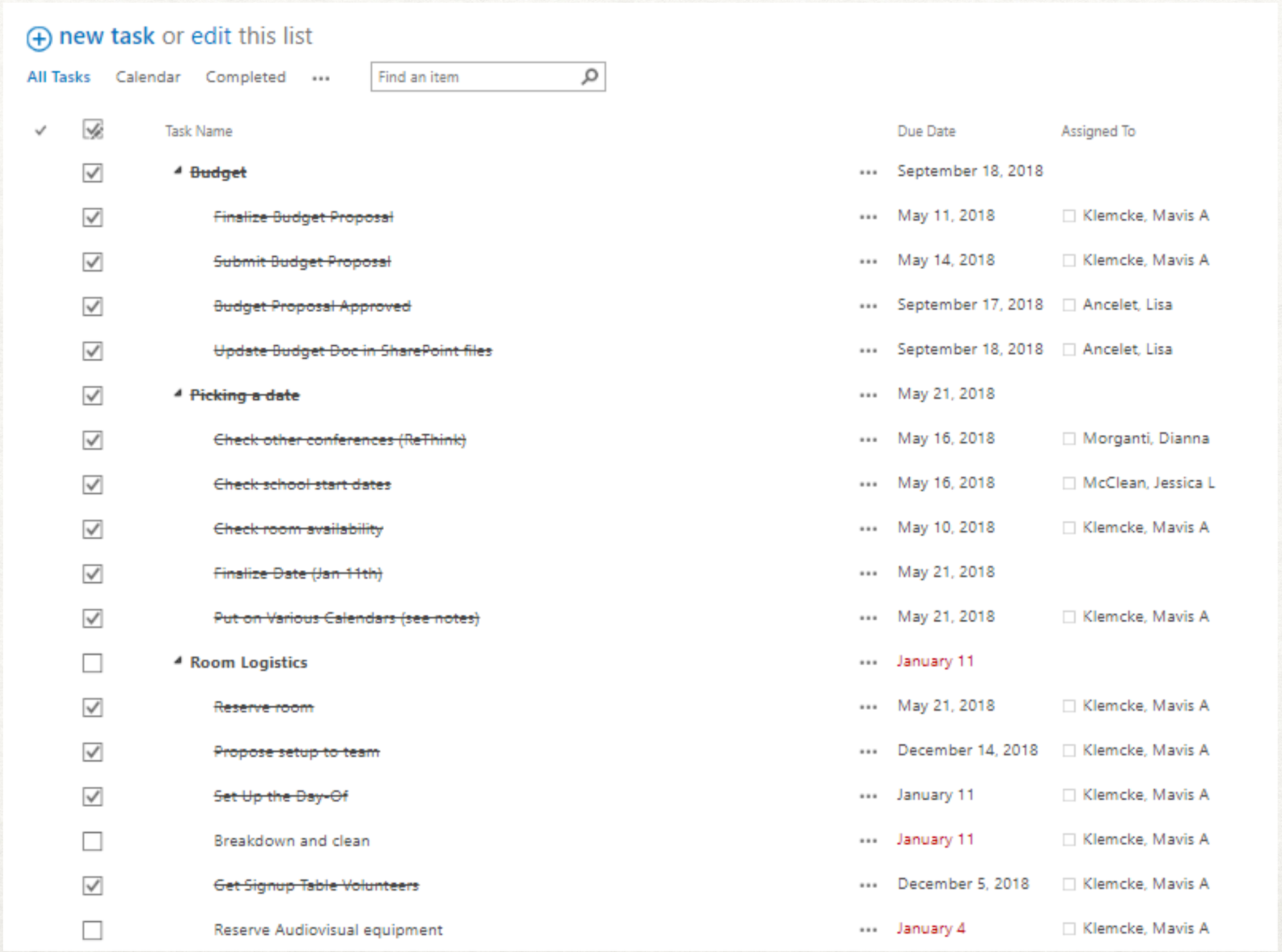


KEEP PLAYING!!

- 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



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®

Dianna Morganti

diannamorganti@txstate.edu

512-245-8506