PLANNING AND CONTROL USING

MICROSOFT® PROJECT 365 and 2021

Including Microsoft Project 2013, 2016 and 2019

PAUL E. HARRIS

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Welcome to the Eastwood Harris Pty Ltd Planning and Control Using Microsoft Project 365 and 2021 Including 2013, 2016 and 2019 training course

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Administration

- Evacuation
- Timings, meals and facilities
- Mobile phones and emails
- Introductions
  - Your name
  - Your position or role
  - Experience in using scheduling software
  - What you wish to learn from this course
  - How you expect to use the software
- Course attendance sheet.

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Course Objectives

This course objectives to are teach:

- The user interface
- How to create a project,
- Creating a schedule without resources,
- Filters, Grouping, Layouts and Printing,
- Baselines and updating an un-resourced project,
- Creating and assigning resources,
- Controlling projects with resources and costs,
- Tools and utilities,
- Most chapters are then reinforced with student workshops working through a scenario of creating a small project planning the submission of a bid.

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Course Conduct

- The course consists of:
- The instructor demonstrating the software using a combination of:
  - A PowerPoint slide show and
  - Live software demonstrations,
- Successful completion of all the course workshops will confirm that the course objectives have been met,
- The instructor will assist students to complete the workshops,
- In accordance with the PMI REP guidelines, students must complete the workshops as per the training manual to be entitled to a course certificate,
- The book is for you to keep,
- Ask any questions as the course progresses.

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Course Agenda

Day 1 Modules

1	Introduction
2	Creating a Project Schedule
3	Navigating and Setting the Options
4	Creating Projects and Templates
5	Defining Calendars
6	Adding Tasks
7	Organizing Tasks Using Outlining
8	Formatting the Display
9	Adding Task Dependencies
10	Network Diagram View
11	Constraints.

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Sample PowerPoint Slideshow

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Course Agenda

Day 2 Modules

12 Filters
13 Tables and Grouping Tasks
14 Views and Details
15 Printing and Reports
16 Tracking Progress
17 Creating Resources and Costs
18 Assigning Resources and Costs to Tasks
19 Resource Optimization
20 Updating Projects with Resources.

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Understanding the Workshops

- There are comprehensive workshops at the end of most modules to enable students to practice the skills taught in the module,
- The student workshops are at the end of each chapter in the Eastwood Harris Microsoft Project books and you are welcome to buy a paper or eBook copy, links at **www.eh.com.au**,
- You do not need to purchase a book and you may download a pdf extract of the book from this web site which includes all the workshops directions,
- The course include the downloading of a Microsoft Project Quick Access toolbar. If you start halfway through the course you should download this toolbar and import it, this topic is covered in the first workshop,
- You may download and import the completed workshops if you wish to start halfway through the workshops or wish to check your answers.

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Downloading Workshop Files

- The workshop files and Quick access toolbar may be download from this web site or **www.eh.com.au**,
- The completed workshops are a ZIP file that will require unzipping before importing into Microsoft Project,
- A simple method of unzipping the files is to double click on the ZIP file to open it and then click and drag the files inside the ZIP file to your desktop,
- These ZIP files contain all the completed workshops which may be imported into PC,
- Detailed instructions are given at the appropriate place in the workshops.

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Module 1 – Introduction

Topics:

- Purpose of the course
- Required Background Knowledge
- Purpose of Planning
- Project Planning Metrics
- Planning Cycle
- Levels of Planning
- Monitoring and Controlling a Project.

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1.1 - Purpose of the course

- The purpose of this course is to provide you with a method for planning and controlling projects using Microsoft Office Project 2021 or 365 and earlier versions,
- This book does not cover Microsoft Project Online
- In a single project environment,
- Up to an intermediate level.

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1.2 - Required Background Knowledge

- The ability to use a personal computer and understand the fundamentals of the operating system,
- Experience using application software such as Microsoft Office, and
- An understanding of how projects are managed, such as the processes that take place over the lifetime of a project.

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Module 2 – Creating a Project Plan Summary

Topics:

- Understanding Planning and Scheduling Software
- Understanding Your Project
- Level 1 – Planning without Resources
- Level 2 – Tracking Progress without Resources
- Level 3 – Planning with Resources
- Level 4 – Tracking Progress of a Resourced Schedule.

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Module 3 - Navigation and Setting the Options

Topics:

- Starting Microsoft Project Professional and Standard
- Identify the Parts of the Project Screen
- Customizing the Screen
- Microsoft Project Windows
- Status Bar
- Forms Available from the Ribbon Groups
- Right-clicking with the Mouse
- Finding the Task Bars in the Gantt Chart
- Setting up the Options
- Mouse Pointers

Continued.....

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Module 3 - Navigation and Setting the Options (Cont.)

- Select All button
- Short Cut Keys
- Help – Tell me what to do
- Workshop 1 – Navigation and Setting Your Project Options

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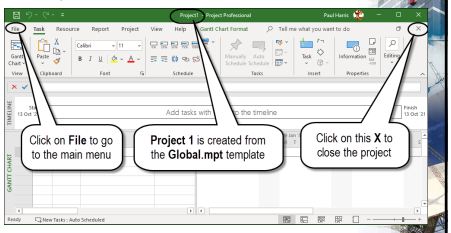
3.1 Starting Microsoft Project

- When you start Microsoft Project for the first time and/or after going through the licensing process you may be shown a screen like the one below with a project file created,
- **Project 1** is created from the **Global.mpt** template and it is recommended that that this template is not used and this file closed and not used,
- You are recommended to use the Eastwood Harris template available from **www.eh.com.au**.



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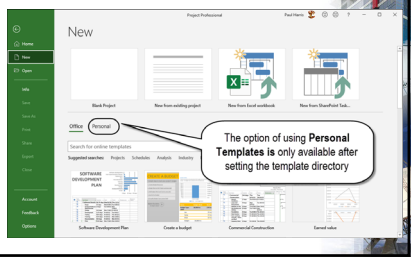
3.1 Creating a Project

To Create a new project you may:

- Create a **Blank Project**, which utilizes your system **Global.mpt** template,
- Creating a project from a **Personal** template, which requires the template directory set before these may be used
- Copy an existing project
- Import data from an **Excel** spreadsheet,
- Import a task list from **SharePoint**,
- Create a project from one of the Microsoft templates,



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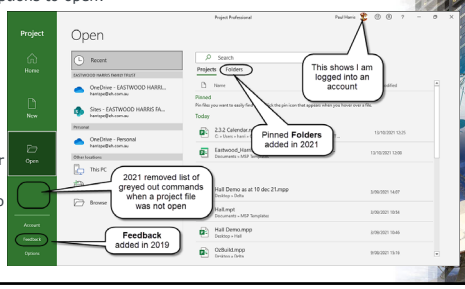
3.1 Opening a Project

The Open screen has options to open:

- **Recent Projects**,
- Open a project from **OneDrive**,
- **This PC**,
- **Add a Place** allows you to map other locations for quicker access to where your files are stored.
- **Browse** allow you to browse the PC or a network.



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Sample PowerPoint Slideshow

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4.1 - Starting Microsoft Project

When opening Microsoft Project the **File, Options**, **General**, **Start up options** the **Show the Start screen when this application starts** check box determines if a **Blank Project** is created,
NOTE: it is recommended that this option is not checked and a project is created from a template.

There are three principal methods of creating a new project:

- Create a **Blank Project** from the **Global.mpt** template, this template is part of your system, or
- Create a project from a user template that contains default data and formats.
  NOTE: This will require you to set the Save template directory in your **Options** for this function to operate,
- Copy an existing project, say by using the **File**, **New**, **New from existing project** option or opening an existing **project** and save it with a new file name.

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4.2 - Creating a Blank Project from the Global.mpt – NOT RECOMENDED

- A blank project created from the **Global.mpt** may be created by:
  - Selecting **File**, **New**, and click on the **Blank Project picture**, or
  - Keying in **Ctrl+N** and depending on your **Options** you may be presented with the **Project Options** form to enter the **Project Start** date.
- The new project will display the project name in the top of the screen,
- At this point the **Project Start** date is normally set in the **Project Information** form, this may displayed automatically depending on your **Project Options**, **Advanced**, **General**, setting.
- Other dates in the Project Information form are:
  - **Current Date**: – This field defaults to today's date,
  - **Status Date**: – This is an optional field used when updating a project,
  - **Calendar**: – This is the project Base calendar that is used to calculate the durations of all tasks.

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Understanding the Global.mpt

The **Global.mpt** template is used to create a **Blank Project**:

- The **Global.mpt** is a template that resides on your machine,
- It adopts the **All New Project** options set **File**, **Options** are editing the **Global.mpt**,
- The **Global.mpt** contents such as filters and calendars are be edited using the **Organizer** command,
- The **Global.mpt** options are **ONLY** adopted by a project created using the **File**, **New** command and selecting **Blank Project**, or typing **Ctl+N**,
- When a project is created using a template or copying another project then the new project does not adopt **Options** set **File**, **Options** set for **All Projects**. These projects copy the options that reside in the template or project,

There are many issues with the **Global.mpt** and it is recommended that it is never used, the instructor will demonstrate.

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Understanding the Global.mpt

There are many issues with the **Global.mpt**

- The **Schedule Options** are not ideal
- The headers and footers have poor formatting and display many irrelevant bars,
- The bar formatting is poor without a negative float bar,
- There is only one Gant Chart View,
- It is not clear if a **Manually Scheduled** task has been created which will stop the software calculating.
- Thus, it is strongly recommended that the **File New**, **Blank Project** command is never used to create a project and you should always use a good template.
- The Eastwood Harris Microsoft Project template has all the issues with the **Global.mpt** resolved is a good start that may be edited to suit your organisations requirements.

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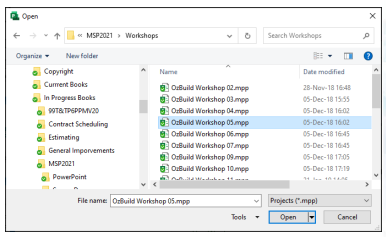
4.3 - Opening an Existing Project

- To open an existing project you should display the **Open** form by selecting:
  - **File**, **Open**, or
  - Typing **Ctl+O**,
  - Using the **Find File** button.



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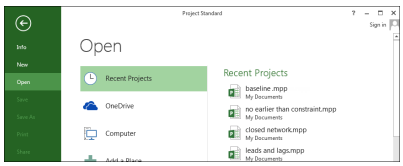
4.4 Re-opening a Project

- Selecting **File**, **Recent** will show a list of recently opened project files.



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6.10 - Elapsed Duration

- A task may be assigned an Elapsed duration and the task will ignore all calendars and the task will take place 24 hours a day and 7 days per week,
- This is useful for tasks such as curing concrete,
- To assign an elapsed duration type an "e" between the duration and units to enter an elapsed duration. The example below shows the difference between a 7-Elapsed Day task and a 7-day task on a Standard (5-day per week) calendar.

Task Name	Duration	Start	Finish
7 day task with elapsed duration	7 edays	01 Sep 08:00	08 Sep 08:00
7 day task	7 days	01 Sep 08:00	09 Sep 17:00

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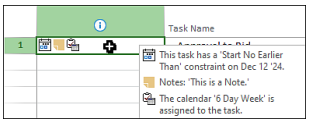
6.11 - Indicators Column

- The Indicators column will display icons in the column when a task contains a non-default setting such as a Note, Constraint, or a Task calendar,
- Placing the mouse over the icon will display information about the task:



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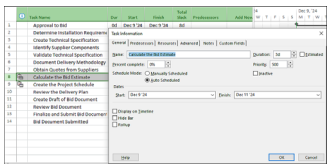
6.12 - Assigning Calendars to Tasks

- Tasks often require a different calendar from the Project Calendar and Microsoft Project allows each task to be assigned a unique calendar,
- A Task Calendar may be assigned by:
  - Using the **Task Information** form, **Advanced** tab, or
  - Displaying the **Task Calendar** column.



	Task Name	Task Calendar
7	Obtain Quotes from Suppliers	None
8	Calculate the Bid Estimate	6 Day Week
9	Create the Project Schedule	6 Day Week
10	Review the Delivery Plan	None

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Module 6 – Adding Tasks - Summary

Topics:

- Understanding Tasks
- Adding New Tasks
- Understanding Change Highlight
- Copying and Pasting Tasks
- Milestones
- Reordering Tasks by Dragging
- Sorting Tasks
- Task Information Form
- Planned Durations
- Indicators Column
- Assigning Calendars to Tasks
- Workshop 4 - Adding Tasks.

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6.13 - Workshop 4 - Adding Tasks

- We will add the tasks for this project and then add the WBS in the next workshop.

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Module 7 – Organising Tasks Using Outlining

Topics:

- Understanding Outlining
- Creating an Outline
- Promoting and Demoting Tasks
- Summary Task Duration Calculation
- Summarizing Tasks
- Project Summary Task
- Workshop 5 - Entering Summary Tasks.

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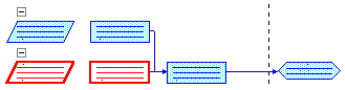
10.1 - Understanding the Network Diagram View

- Summary tasks, Detail tasks and Milestones are normally formatted with a different shape,
- Typical shape examples are provided as follows:
  - Summary tasks are trapezoidal
  - Detail tasks are rectangular
  - The Milestone Task is an elongated diamond:



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10.2 - Adding and Deleting Tasks in the Network Diagram View

- A New Task may be created with a Finish-to-Start relationship by dragging from the center of a Task Box into a blank part of the screen,
- A New Task may be created without a relationship below the tasks position in the Gantt Chart by:
  - Using the Insert Key, or
  - Selecting Task, Insert group, Task, New Task button.

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10.3 - Adding, Editing and Deleting Dependencies

Dependencies may be added, edited or deleted using the following methods:

- Graphically add a relationship,
- Hold the Ctrl Key to select two or more tasks and then use the **Task**, **Schedule** group, **Link Task** function,
- The **Task**, **Schedule** group**, Unlink Task** function removes dependencies between selected tasks,
- Open the **Task Information** form by double-clicking on a task and selecting the **Predecessors** tab,
- Double-click on a Relationship line to open the **Task Dependency** form and edit or delete a dependency,
- Create a split window by right-clicking and selecting **Show Split** and then display the predecessors and successors in the bottom pane.

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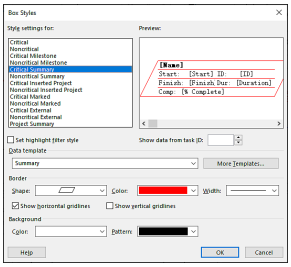
10.4 - Formatting the Task Boxes

- Task Boxes may be formatted from the **Box Styles** form,
- This is displayed by selecting **Format**, **Format** group, **Box Styles**.



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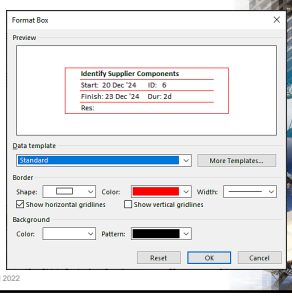
10.5 - Formatting Individual Boxes

- Once highlighted, a **Task Box** may be formatted differently from all the others by:
  - Selecting **Format**, **Format** group, **Box** to open the **Format Box** form, or
  - Double-clicking on the outside edge of a box.



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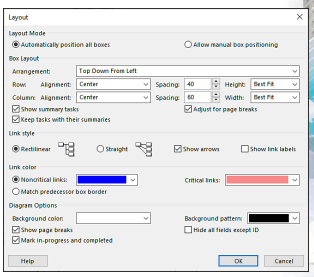
10.6 - Formatting the Display and Relationship Lines

- Most formatting, except formatting the boxes, is set within the **Layout** form,
- Select **Format**, **Format** group, **Layout** to open the **Layout** form:



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Sample PowerPoint Slideshow

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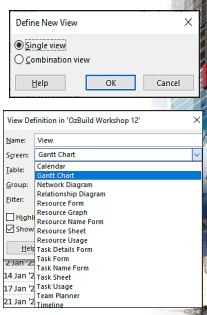
14.2 Creating a New View

- A new **View** may be created by copying and editing an existing **View**, or creating a new **View**,
- There are two types of Views:
  - **Single View**, and
  - **Combination View** which specifies which View is displayed in the **Top Pane** and **View** is displayed **Bottom Pane**.
- The instructor will demonstrate how to create a new **View**.



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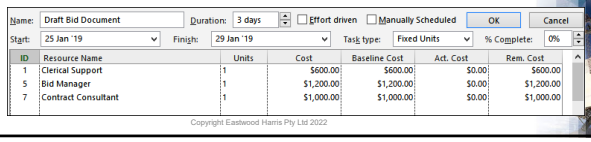
14.3 Details Form

- **Details** forms are the third level of formatting that may be assigned **Bottom Pane** in some views,
- Each **Details** view has a number of options, which tends to make this aspect of Microsoft Project difficult for all levels of users,
- The **Details** forms may be selected in the bottom pane by right-clicking in the active pane to open a menu,
- The instructor will demonstrate examples of **Details** forms.



ID	Resource Name	Units	Cost	Baseline Cost	Act. Cost	Rem. Cost
1	Clerical Support	1	$600.00	$600.00	$0.00	$600.00
5	Bid Manager	1	$1,200.00	$1,200.00	$0.00	$1,200.00
7	Contract Consultant	1	$1,000.00	$1,000.00	$0.00	$1,000.00

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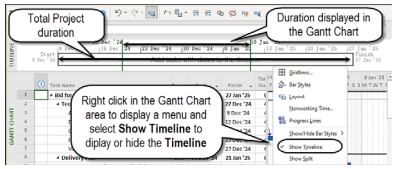
14.4 Timeline View

- The **Timeline View** allows you to clearly understand how much of the Gantt Chart is displayed on the screen,
- The **Timescale View** is shown above the **Gantt Chart** by selecting **View**, **Split View** group and checking the **Timeline** check box,
- A task may be added to the **Timeline View** by selecting the **Add to Timeline** found in many menus.



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Timeline View in Microsoft Project 2016

Microsoft Project 2016 introduced the ability to:

- Add multiple Timelines,
- Change the Start and Finish date of the Timeline and
- Format the Colors of each individual Timeline,
- The instructor will demonstrate.

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14.5 A Logical Process for Developing a View

The following process is suggested for creating a new View;

- Collect the View requirements,
- Plan the naming/coding system to be used if there are a number of views to be created,
- Create any Custom fields required,
- Create the Table, Filter and Grouping to be used with the View,
- Create the View and assign the Table, Filter and Grouping,
- Create the print headers and page setup,
- Format the Timescale, Gridlines, Bars,
- Apply any special sorting or font formatting,
- Save the file,
- Copy the View to create all new Views with the Print settings and Gant Chart formatting set as a standard in the first View.

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Module 14 - Views & Details - Summary

Topics

- Applying an Existing View
- Understanding Views
- Creating a New View
- Details Form
- Timeline View
- A Logical Process for Developing a View
- Workshop 12- Organizing Your Data Using Views and Tables.

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Important Points – Completed Tasks

- A complete Milestone should have:
  - The Actual Start date, and
  - Then 100 % Complete entered
  - See Task 1 below.
- Entering an Actual Start and then the Actual Finish date will convert the Milestone to a task, see Task 2 below:

	Task Name	Act. Start	Act. Finish	% Comp.	Act. Dur.
1	Start MS	5 Jan	5 Jan	100%	0d
2	Start MS	5 Jan	5 Jan	100%	1d

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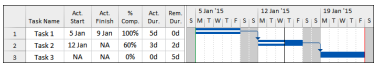
Important Points – In-Progress Tasks

- There is an in-built proportional link between Duration, Actual Duration, Remaining Duration and % Complete,
- It is not possible to unlink these fields and therefore not possible to enter the Remaining Duration independently of the % Complete,
- The Physical % Complete may be used to show the progress of a task that is independent of the durations,
- There are many methods of updating an in-progress task that you may explore in your own time.



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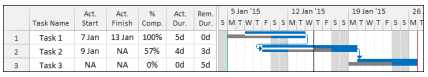
Important Points – In-Progress Tasks continued

- The workshop in this book uses the following method:
- The Tracking table is applied and Status Date set,
- The Actual Start is entered,
- The Actual Duration should be entered so that progress is up to the Status Date, or use the Mark on Track button,
- Then the Remaining Duration may then be entered so the Finish date is correct and the Actual Duration will not change,
- The % Complete will be calculated by Microsoft Project.



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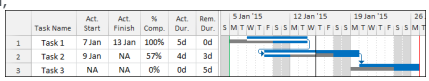
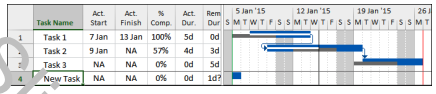
Important Points – Un-Started Tasks

- The Un-started tasks should have durations and logic adjusted as required,



- New Un-started tasks without predecessors will stay on the project start date and ignore the Status date unless a constraint is assigned, say by dragging the task.



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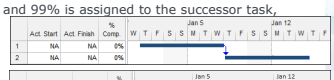
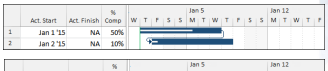
Split In-Progress Tasks

- There are two options in the File, Options, Schedule tab for calculating the finish date of the successor when the successor task starts before the predecessor task is finished. This option will operate when:
  - The Project Option Split in-progress tasks is checked,
  - There is an Actual Start, and
  - A % Complete between 1% and 99% is assigned to the successor task,
    - Before updating:



    - **Split in-progress tasks** unchecked:



    - **Split in-progress tasks** checked:

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16.5 - Procedure for Updating a Schedule Using Update Project

- This method of updating a schedule uses the **Update Project** function and is ideally suited to a situation when the plan is being closely followed and only minor adjustments are required to the actual dates and durations.
- This will result in a properly updated schedule with complete work in the past and incomplete work in the future:
- In summary the process:
  - Sets and displays the **Baseline**,
  - Runs the **Update Project** function,
  - Then the user adjusts the program to reflect reality,
- This process is ideally suited to a situation when the plan is being closely followed and only minor adjustments are required to the Actual Dates and Remaining Durations,
- It may not suit all situations especially when a project is way off plan.

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Resource Optimizing

- At this point in the preparation of the schedule the resources should be reviewed and optimized to ensure that they are being:
  - Efficiently used, and
  - Sufficient resources are available,
- This chapter will briefly cover the following topics which will enable you to review your resources:
  - Resource Histograms
  - Resource Tables
  - S-Curves
  - Leveling.

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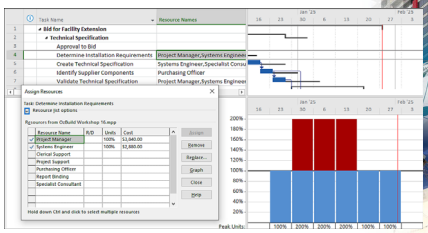
19.1 Resource Graph View Displayed form the Assign Resources form

- Selecting **Graph** from the **Assign Resources** form will display the **Resource Graph** form in the Bottom Pane, as per the picture below and not produce a separate picture as in earlier version of Microsoft Project:



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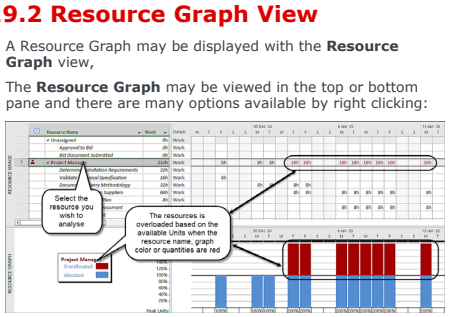
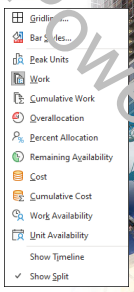
19.2 Resource Graph View

- A Resource Graph may be displayed with the **Resource Graph** view,
- The **Resource Graph** may be viewed in the top or bottom pane and there are many options available by right clicking:





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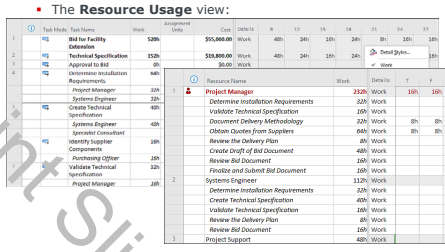
19.3 Resource Tables

- **Resource Tables** are displayed using either:
  - The **Task Usage** view, or
  - The **Resource Usage** view:



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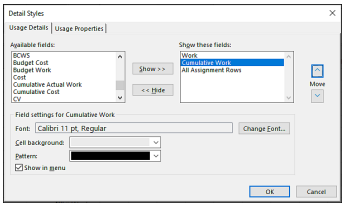
19.4 Detailed Styles Form

- This form may be opened from the **Resource Usage** and **Task Usage** forms by right-clicking and selecting **Detailed Styles**...,
- This allows further options for formatting these views:



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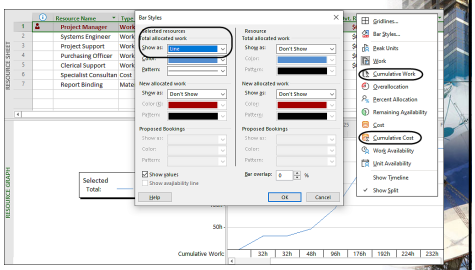
19.5 Creating an S-Curve from Microsoft Project

- A single S-Curve for the current schedule and not the **Baseline** may be created graphically and displayed by Microsoft Project.



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20.6 Updating Resources

- There are many permutations available in the **File**, **Options** form for calculating resource data,
- Due to the number of resource options and numerous forms available in Microsoft Project, it is not feasible to document or teach all the combinations available,
- One or more resources may be applied to a task and you may want to enter both the **Actual Work** and the **Remaining Work** independently,
  - In this situation you will need to unlink **% Complete** and **Actual Work** with the **Updating task status updates resource status** option in the **File**, **Options**, **Schedule** tab,
  - Now the **% Work** field will still be linked to the **Work**, **Actual Work** and **Remaining Work** fields and will now operate independently of the **% Complete** field and not linked to the **% Complete** field .

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Updating Resources (continued)

- You may want to enter both the **Actual Work** and **Actual Costs** separately,
- This process is very time consuming and requires significant organizational commitment to succeed,
- In this situation you will need in the **File**, **Options**, **Schedule** tab to:
  - Unlink **% Complete** and **Actual Work** with the **Updating task status updates resource status**,
  - Unlink the **Actual Work** and **Actual Costs** by disabling the **Actual costs are always calculated by Project** option, and
  - To ensure the **Actual Costs** are spread to the **Status Date** you should also check **Edits to total actual costs will be spread to the status date**. This option ensures **Actual Costs** are in the past and **Remaining Costs** are in the future.

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Additional Updating Functions

Microsoft Project has two functions that may assist in updating a project:

- **Update work as completed through:** (date)
  - When a project is updated using the **Update Project** form the project is updated as if it were progressing exactly according to plan and the **Status Date** is set to the same date as **Project Update Date** at 17:00hrs, and
- **Reschedule uncompleted work to start after:** date
  - This function is used to move the **Incomplete Work** of **In-Progress** tasks into the future,
  - **In-Progress** tasks must be able to **Split** for this function to operate. The option to split tasks is found on the **File**, **Options**, **Schedule** tab,
  - The **Status Date** is NOT set to the **Reschedule uncompleted work to start after:** date when this function is used.

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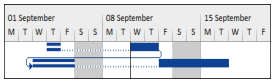
20.7 Splitting Tasks

When the **Split in-progress tasks** option is enabled, a task may be Split by:

- Dragging the incomplete portion of a task in the bar chart, or
- Clicking on the button and then moving your cursor over the point on the task bar where you want a split and dragging the task, or
- Using the **Project**, **Status** group, **Update Project**, **Reschedule uncompleted work to start after:** function, or
- Commencing a task before its predecessor finishes,
- In the picture below the upper task was split using the **Split** button and the lower task was split because it commenced before its predecessor.



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20.8 Summary Tasks and Earned Value

- **Actual Costs** and **Actual Work** may be summarized at any level in the same way as **Work** and **Costs**,
- The picture below is showing the **Earned Value** table and the costs have been summarized up to the Project Level,
- **Note:** Check the way Microsoft Project calculates the Bid for Facility Extension task VAC:

	Task Name	Planned Value - PV (BCWS)	Earned Value - EV (BCWP)	AC (ACWP)	SV	CV	EAC	BAC	VAC
1	Bid for Facility Extension	$7,440.00	$9,558.00	$10,000.00	$1,118.00	-$442.00	$69,625.70	$55,060.00	-$14,565.70
2	Technical Specificatio	$7,440.00	$9,558.00	$10,000.00	$1,118.00	-$442.00	$25,037.94	$19,800.00	-$5,237.94
3	Approval to Bid	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4	Determine Installat	$6,720.00	$6,720.00	$7,000.00	$0.00	-$280.00	$7,000.00	$6,720.00	-$280.00
5	Create Technical Sp	$720.00	$2,838.00	$3,000.00	$1,118.00	-$162.00	$21,717.17	$8,600.00	-$13,117.17
6	Identify Supplier Cc	$0.00	$0.00	$0.00	$0.00	$0.00	$1,120.00	$1,120.00	$0.00
7	Validate Technical S	$0.00	$0.00	$0.00	$0.00	$0.00	$3,360.00	$3,360.00	$0.00
8	Delivery Plan	$0.00	$0.00	$0.00	$0.00	$0.00	$21,520.00	$21,520.00	$0.00
14	Bid Document	$0.00	$0.00	$0.00	$0.00	$0.00	$13,740.00	$13,740.00	$0.00

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Summary Tasks and Earned Value (continued)

- The method that Microsoft Project uses to calculate the Earned Value data is documented in the Help file and should be read carefully, as different versions of Microsoft calculate these fields differently,
- Should different Earned Value calculations be required then Custom Data Fields should be considered as an alternative.

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Module 20 – Updating Projects with Resources - Summary

Topics:

- Understanding Baseline Dates, Duration, Costs and Hours
- Understanding the Status Date
- Formatting the Status Date
- Information Required to Update a Resourced Schedule
- Updating Dates and Percentage Complete
- Updating Resources
- Additional Updating Functions
- Splitting Tasks
- Summary Tasks and Earned Value
- Workshop 18 - Updating a Resourced Schedule.

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20.9 Workshop 18 - Updating a Resourced Schedule

- We need to update the tasks and resources,
- The instructor will demonstrate this workshop first.

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Review Expectations

- Complete Feedback Sheet and
- Have we met your expectations?

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Thank you for attending

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