

# Microsoft Project 2016

Step

by

Step

Carl Chatfield  
Timothy Johnson



PRACTICE FILES

# Contents

## Introduction

[Who this book is for](#)

[The \*Step by Step\* approach](#)

[Download the practice files](#)

[Ebook edition](#)

Sidebar: [Adapt procedure steps](#)

[Get support and give feedback](#)

[Errata and support](#)

[We want to hear from you](#)

[Stay in touch](#)

## Part 1: Get started with Microsoft Project

### **1 Project, project management, and you**

[Meet the Project program](#)

[Meet the Project family](#)

[See the new features in Project 2016](#)

[What was new in Project 2013](#)

[What was new in Project 2010](#)

[Take a project manager's perspective](#)

[Let's get started!](#)

### **2 Take a guided tour**

[Explore the Project user interface](#)

[Manage files and set options in the Backstage view](#)

Sidebar: [Templates: Avoid reinventing the wheel](#)

[Work with schedule details in views](#)

[Use reports to check a plan's status](#)

[Skills review](#)

[Practice tasks](#)

## Part 2: Simple scheduling basics

### **3 Start a new plan**

[Create a new plan and set its start date](#)

[Set nonworking days in the project calendar](#)

[Enter the plan title and other properties](#)

Sidebar: [Project management focus: Project is part of a larger picture](#)

[Skills review](#)

[Practice tasks](#)

## **[4 Build a task list](#)**

[Create tasks](#)

Sidebar: [Project management focus: Defining the right tasks for the deliverable](#)

[Enter task durations and dates](#)

Sidebar: [Project management focus: How do you come up with accurate task durations?](#)

[Enter milestone tasks](#)

[Create summary tasks to outline the plan](#)

Sidebar: [Project management focus: Top-down and bottom-up planning](#)

[Link tasks to create dependencies](#)

[Switch task scheduling from manual to automatic](#)

[Check a plan's duration and finish date](#)

[Document task information](#)

[Skills review](#)

[Practice tasks](#)

## **[5 Set up resources](#)**

[Set up work resources](#)

Sidebar: [Equipment resource considerations](#)

[Enter the maximum capacity for work resources](#)

[Enter work resource pay rates](#)

Sidebar: [Project management focus: Getting resource cost information](#)

[Adjust working time in a resource calendar](#)

[Set up cost resources](#)

[Document resources by using notes](#)

[Skills review](#)

[Practice tasks](#)

## **[6 Assign resources to tasks](#)**

[Assign work resources to tasks](#)

[Control work when adding or removing resource assignments](#)

Sidebar: [Project management focus: When should effort-driven scheduling apply?](#)

[Assign cost resources to tasks](#)

[Check the plan after assigning resources](#)

[Skills review](#)

[Practice tasks](#)

## **7 Format and share your plan**

[Customize a Gantt chart view](#)

Sidebar: [Drawing on a Gantt chart](#)

[Add tasks to a Timeline view](#)

Sidebar: [Panning and zooming a Gantt chart view from a Timeline view](#)

[Customize reports](#)

[Copy views and reports](#)

[Print views and reports](#)

[Skills review](#)

[Practice tasks](#)

## **8 Track progress: Basic techniques**

[Understand progress tracking](#)

[Save a baseline of your plan](#)

[Track a plan as scheduled](#)

[Enter a task's completion percentage](#)

[Enter actual values for tasks](#)

Sidebar: [Project management focus: Is the project on track?](#)

[Skills review](#)

[Practice tasks](#)

## **Part 3: Advanced scheduling techniques**

### **9 Fine-tune task scheduling**

[See task relationships by using Task Path](#)

[Adjust task link relationships](#)

[Control task scheduling by using constraints](#)

[Interrupt work on a task](#)

[Adjust working time for individual tasks](#)

[Control task scheduling by using task types](#)

Sidebar: [Assignment units, Peak, and the assignment calculation](#)

Sidebar: [Task types and effort-driven scheduling](#)

[See task schedule details by using the Task Inspector](#)

[Skills review](#)

[Practice tasks](#)

## **10 Fine-tune task details**

[Enter deadline dates](#)

[Enter fixed costs](#)

[Create a recurring task](#)

[View the plan's critical path](#)

[Schedule summary tasks manually](#)

[Skills review](#)

[Practice tasks](#)

## **11 Fine-tune resource and assignment details**

[Change resource availability over multiple date ranges](#)

[Work with multiple resource pay rates](#)

[Change resource pay rates over different date ranges](#)

[Delay the start of assignments](#)

[Apply contours to assignments](#)

[Create and assign material resources](#)

[View resource capacity](#)

[Adjust assignments in the Team Planner view \(Project Professional only\)](#)

[Skills review](#)

[Practice tasks](#)

## **12 Fine-tune the Project plan**

[Examine resource allocations over time](#)

Sidebar: [Project management focus: Evaluate resource allocation](#)

[Resolve resource overallocations manually](#)

[Level overallocated resources](#)

[Check the plan's cost and finish date](#)

Sidebar: [Project management focus: Finish date and critical tasks](#)

[Inactivate tasks \(Project Professional only\)](#)

[Skills review](#)

[Practice tasks](#)

### **[13 Organize plan details](#)**

[Sort plan details](#)

[Group plan details](#)

[Filter plan details](#)

[Create new tables](#)

Sidebar: [Create custom fields quickly](#)

[Create new views](#)

[Skills review](#)

[Practice tasks](#)

### **[14 Track progress: Detailed techniques](#)**

[Update a baseline](#)

Sidebar: [Save interim plans](#)

[Track actual and remaining work for tasks and assignments](#)

Sidebar: [Enter actual costs manually](#)

[Track timephased actual work for tasks and assignments](#)

Sidebar: [Project management focus: Collect actuals from resources](#)

[Reschedule incomplete work](#)

[Skills review](#)

[Practice tasks](#)

### **[15 View and report project status](#)**

[Examine a plan's variance](#)

Sidebar: [Project management focus: Get the word out](#)

[Identify tasks that have slipped](#)

Sidebar: [Project management focus: Is variance ever a good thing?](#)

[Examine task costs](#)

[Examine resource costs](#)

[Skills review](#)

[Practice tasks](#)

[Part 4: In-depth and special subjects](#)

## **16 Format and print views: In-depth techniques**

[Format a Gantt chart view](#)

[Format a Timeline view](#)

[Format a Network Diagram view](#)

[Format a Calendar view](#)

[Print and export views](#)

[Skills review](#)

[Practice tasks](#)

## **17 Format reports: In-depth techniques**

[Create a custom report](#)

    Sidebar: [How reports compare to views](#)

[Customize charts in a report](#)

[Customize tables in a report](#)

[Skills review](#)

[Practice tasks](#)

## **18 Customize Project**

[Share custom elements between plans](#)

[Record and run macros](#)

[Edit macros](#)

[Customize the ribbon and Quick Access Toolbar](#)

[Skills review](#)

[Practice tasks](#)

## **19 Share information with other programs**

[Copy Project data to and from other programs](#)

[Open files in other formats in Project](#)

[Save to other file formats from Project](#)

    Sidebar: [Share files with previous versions of Project](#)

[Generate reports with Excel and Visio](#)

[Skills review](#)

[Practice tasks](#)

## **20 Consolidate projects and resources**

[Share a resource pool across multiple plans](#)

Sidebar: [Create a dedicated resource pool](#)

[Consolidate plans](#)

Sidebar: [Keep consolidated plans simple](#)

[Create dependencies between plans](#)

[Skills review](#)

[Practice tasks](#)

[Appendix A: A short course in project management](#)

[Appendix B: Develop your project-management skills](#)

[Appendix C: Collaborate: Project, SharePoint, and PWA](#)

[Appendix D: Use this book in a classroom](#)

[Glossary](#)

[Index](#)

[About the authors](#)

---



**Give us feedback**

Tell us what you think of this book and help Microsoft improve our products for you. Thank you! <http://aka.ms/tellpress>

---