How to Use Microsoft Project 2016

For this tutorial, we'll be using the most recent version, Microsoft Project 2016. There are many versions available, so you'll want to check which one you're using. There are similarities in the steps for some of the releases, so some of the steps will translate well among the various versions. If you're using Project 2010 or Project 2013, you shouldn't have any issues importing them to 2016 (if you plan on upgrading) since they use the same file format. However, Project 2016 is a bit more robust and has more timeline features, a handy search tool called "Tell Me" for finding features, improved resource management, and office add-ins. This MS Project tutorial will just cover the basic features that are found in most versions.

How to Use Microsoft Project 2016

Microsoft Project has a lot of features for setting up projects and running automated reports based on progress, budget, time tracking, and more. We'll take you through the steps needed to set-up a timeline, add and schedule tasks, add resources, setup dependencies, generate reports, and track progress. As an example, we'll use a common business requirement when dealing with vendors: tracking the progress of calling for RFPs.

How to Create a Timeline in Microsoft Project Tutorial

Microsoft Project doesn't have a Timeline template, so you'll need to enter data manually to build a Microsoft Project Timeline. It's probably because it's the most basic feature and a template isn't needed to get started.

1. Create a Task List
You'll need to build a list of required tasks. While building the list, try to prioritize them in the order they need to be completed. To get started,

open Microsoft Project, click *Blank Project*, and type each task into a cell under *Task Name*.

2. Add Start and Finish Dates to Each Task

To enter start and end dates, click the *Start* cell that corresponds to the first task and enter a date (if you click the down arrow in the cell, a calendar will appear and you can use that to select a date). Then tab over to the *Finish* row and enter an end date. Microsoft will automatically enter the amount of time it will take to complete the task

in the *Duration* row. You'll notice that as you add the dates, bar charts will be added to the timeline in the right-hand pane.


3. Add Tasks to the Timeline
To add tasks to the Timeline, click the View tab and click the *Timeline* bar that appears above the task list. Then right-click on a Task cell and choose Add to *Timeline* from the list and click it to add the task to the timeline.

Tip: You can select all tasks in the list and then right-click on the mouse and select *Add to Timeline* to add all the tasks simultaneously.
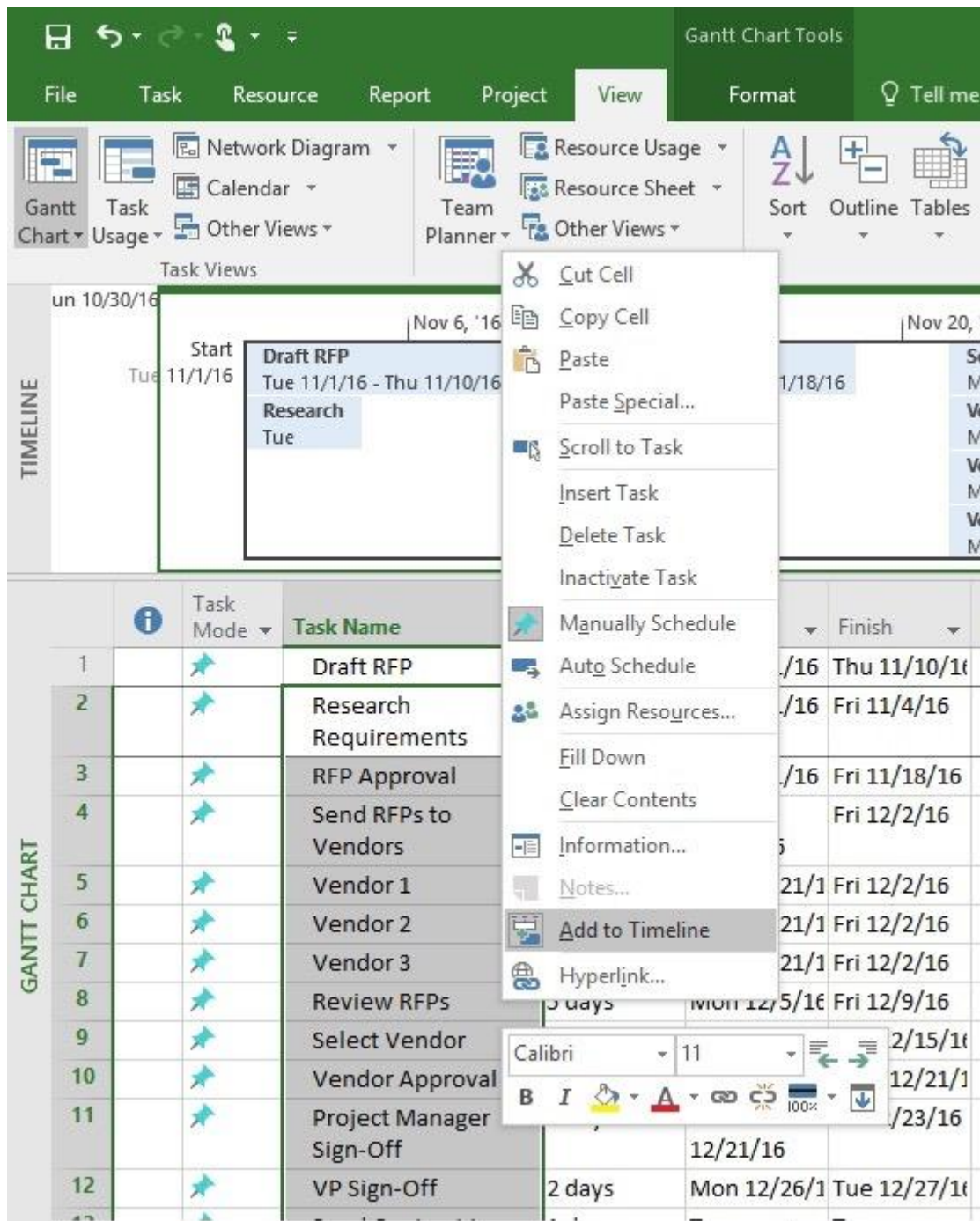
How to Set Up Resources in Microsoft Project

Now that you have the basic structure for your project, we're going to add the resources you need to get the job done. The term "resources" typically refers to people, but can also mean documentation or a certain type of work that will be needed to complete the project.

1. Open the Resource Sheet

From the *View* tab, click *Resource Sheet.* The Resource Sheet will appear on the screen.
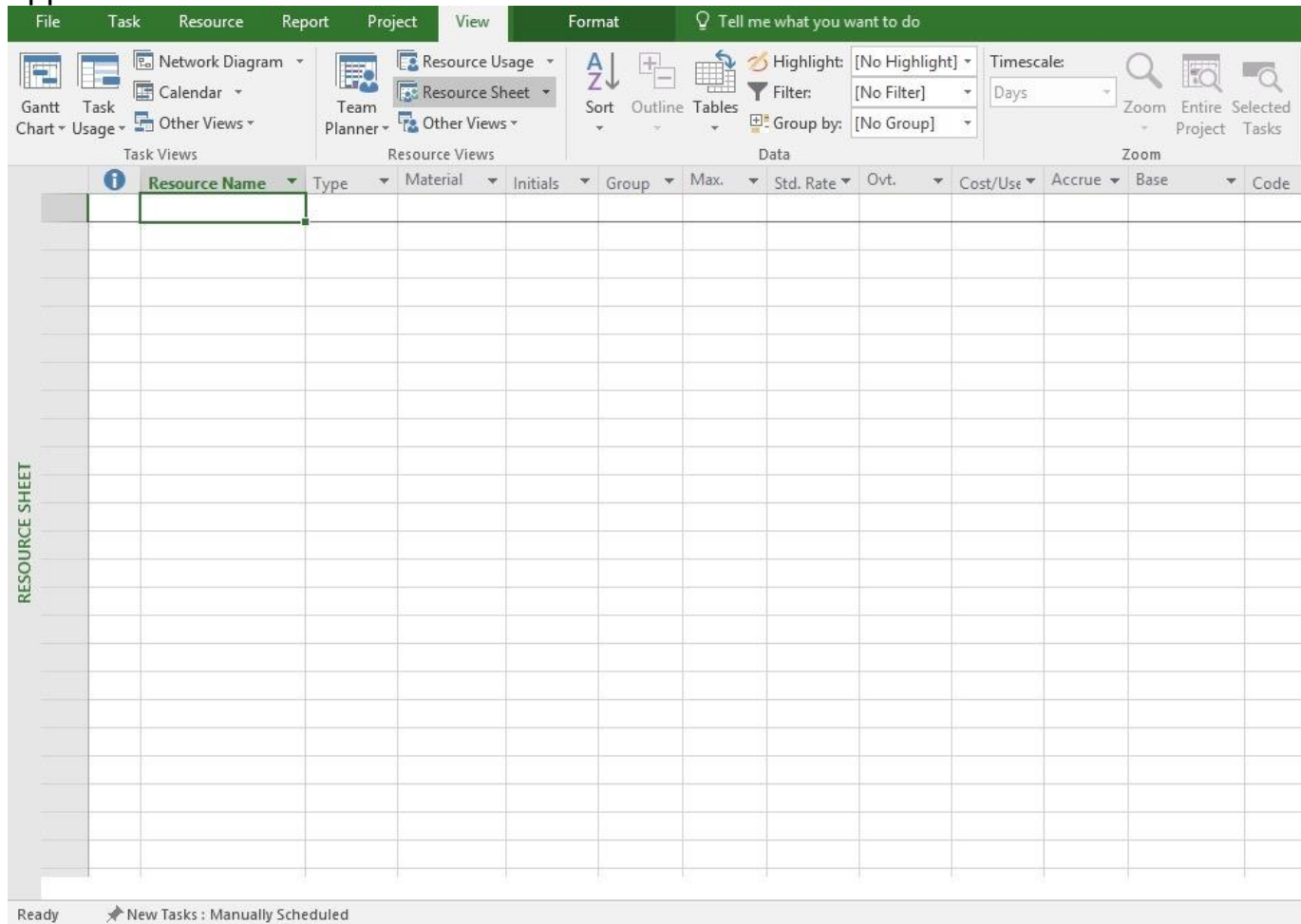
2. Add Resources

Type the name of the resource needed in the Resource Name field and complete the remainder of the information: Type, Material (if it's a material), Initials, Max (max amount of time), Standard Rate, Overtime, Cost/Use, Accrue, Base, and Code.

Once your resources are added to the project, you can easily view who is available to take on the task based on their workload, and manage how much time each team member will spend on tasks in the Resource Management view. (Smartsheet is an ideal tool for project managers because the Resource Management feature provides real-time information about your team's availability in one sheet, so you can easily make decisions on assignments and update responsibilities to maximize your team's time.)

How to Assign Tasks in MS Project

Once you have a list of resources for your project, you'll want to assign tasks. This will help you better manage the project and get work done in a specific time period. One of the benefits of MS Project is that it can calculate how long it will take a person to complete the task based on their availability. If it's a particularly important part of the project that needs to be done quickly, you can assign multiple people to it and Microsoft Project will decrease the time it takes to complete the task based on how many resources are assigned. This also lets the people assigned to the project know how much time is required of them.

1. Switch to the Gantt chart
To assign tasks, you'll need to switch to the Gantt chart. Click the Gantt chart icon in top left corner of the window.

2. Open the Task Form

You should still be in the *View* tab. Click the *Details* box in the ribbon. The *Task Form* should appear on the lower half of the screen. If it doesn't appear, click the down arrow in the *Details* box and select *Task Form*.

3. Select a Task to Assign

Click a task in the Gantt chart view and it will appear in the *Name* section of the Task Form. Click the box under *Resource Name* and choose a resource from the drop-down menu. Then click *OK*.

You can add another person to the same task by clicking the area under *Resource Name* and choosing the name you want. Click *OK*. As you assign tasks, the amount of time will be added to the Gantt chart.

Repeat steps to assign all the tasks.

Note: Clicking the Next button (located on the right side of the *OK* button) will load the next task in the Gantt chart.

How to Schedule Tasks Automatically or Manually

With Microsoft Project 2016 you can schedule tasks manually or automatically. When you opt to manually schedule tasks it's up to you schedule all new tasks and track them to ensure they are being completed on time. If you choose Automatic scheduling, Project will schedule tasks based on dependencies, calendars, and constraints among other things. The default option when creating tasks is to schedule them manually, so we'll show you here how to change the setting to automatic.

1. Access Microsoft Project Settings

Click *File* on the menu bar and choose *Options* (it's the last choice in the left column). Click *Edit project settings*.
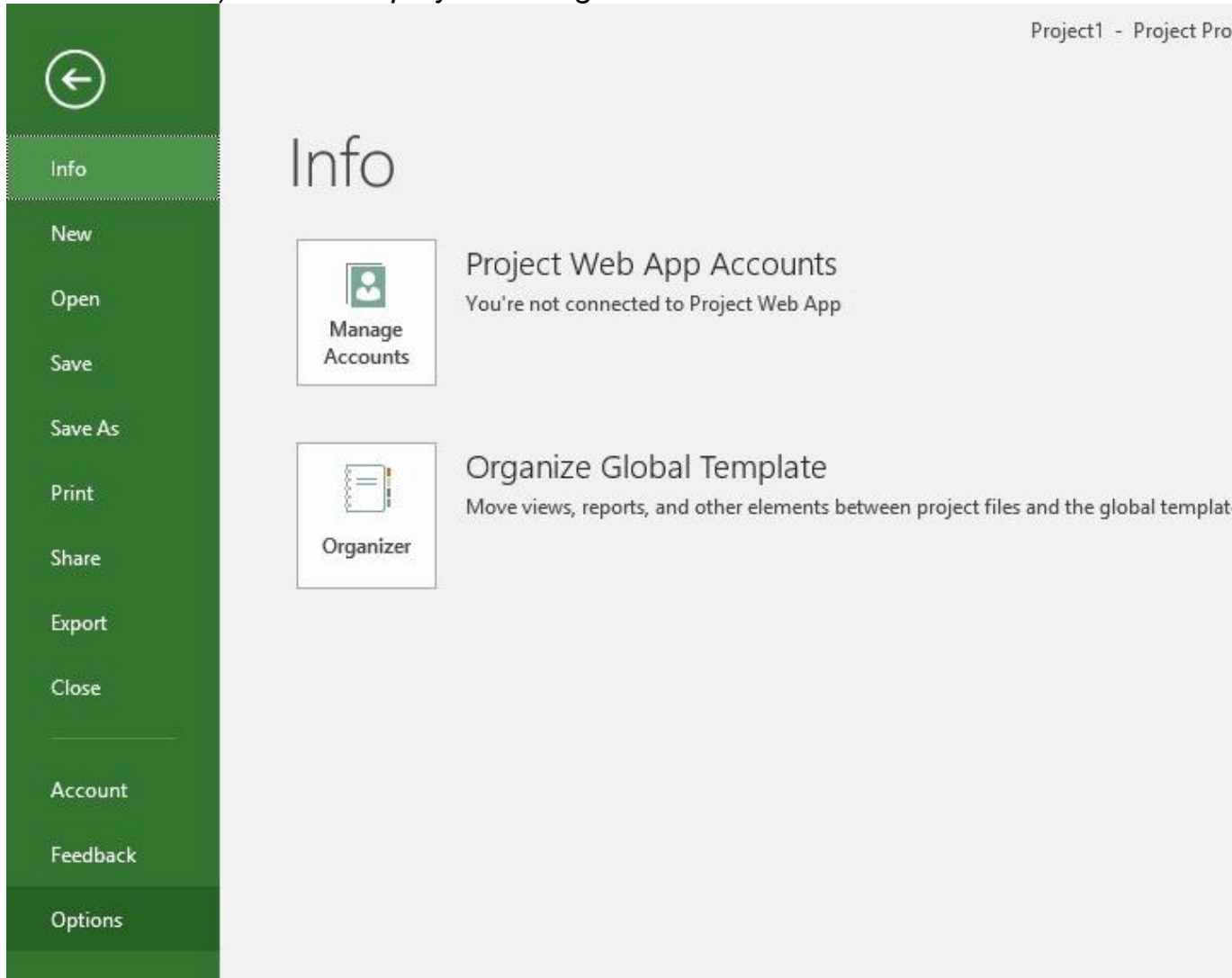
2. Change Schedule Options

When the Project Options form appears on the screen, click *Schedule* in the left column.

Next, under Scheduling Options for this Project section, click the drop-down menu for *New Tasks Created*. The default is set to *Manually Scheduled*. Select and click *Auto Scheduled* and click the *OK* button.
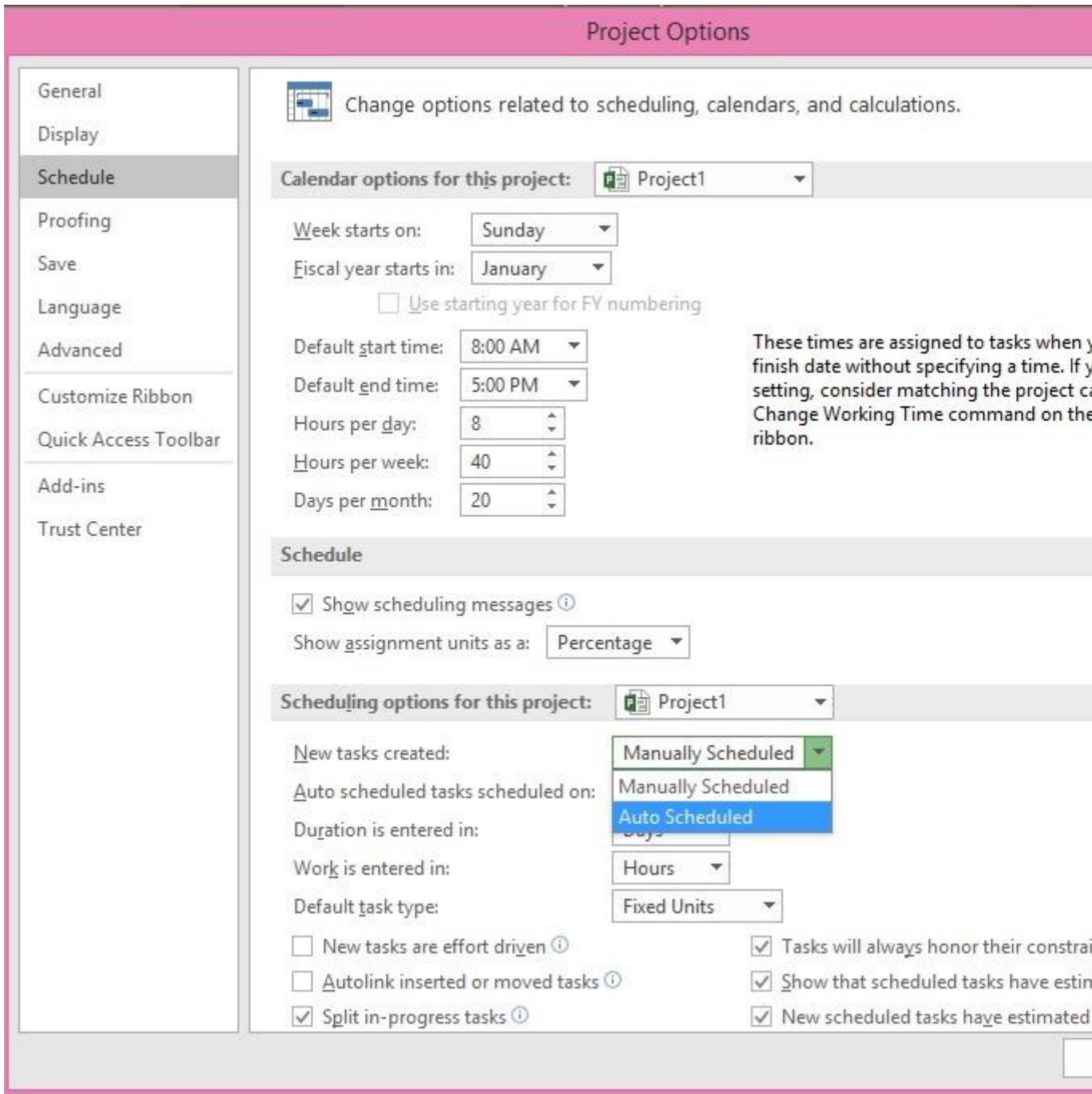
How to Create Task Dependencies

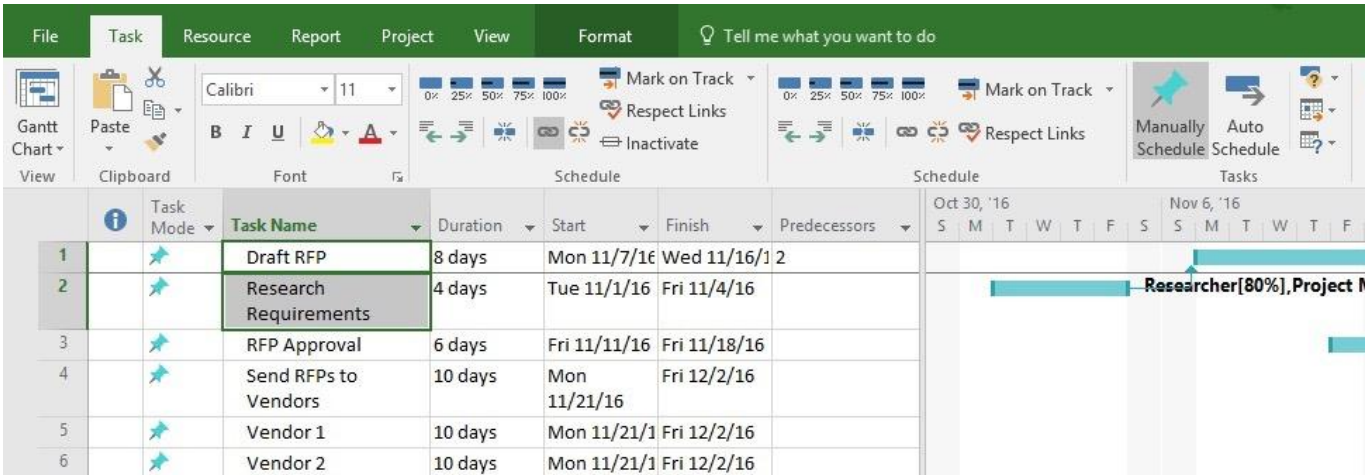Dependencies occur when one task can't move on to the next phase until a particular task is completed before it. Creating dependencies involves linking tasks in the Gantt chart view. In Microsoft Project, you can link any two tasks. Once tasks are linked, every change made to the predecessor affects the successor.

1. Switch to Gantt Chart View

You should still be in the Gantt chart view. If you're not, click the Gantt chart icon in top left corner of the window.

2. Select Tasks to Link

Click the *Task* tab in the menu bar. Identify the two tasks in the list that you want to link. Click the first task and press and hold the Ctrl key and select the second task. Click the chain icon in the ribbon to link the tasks. You'll see an arrow appear on the Gantt chart that connects the items.

Follow the same steps to link additional items.

Generate a Cost Report in Microsoft Project 2016

Once you've entered time and resources information to the best of your ability, you can use Project to run a Cost Overview report. Here's how to create a Resource Cost Overview report:

1. Select the Report Tab
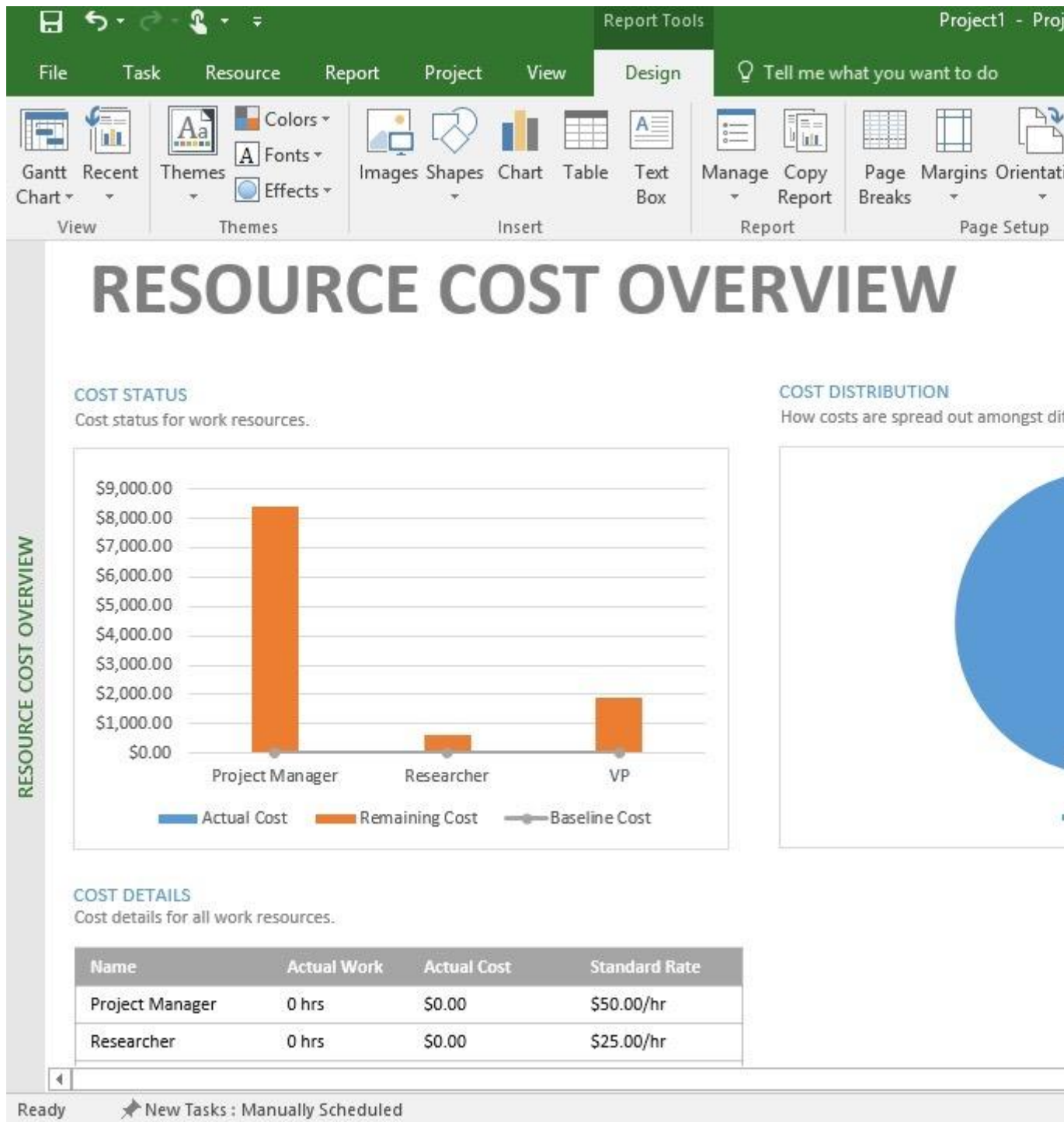
Click the *Report* tab to get a quick overview of the reports you can run.

2. Choose a Cost Report to Run

Click the arrow below *Costs* in the ribbon and click *Resource Cost Overview*.
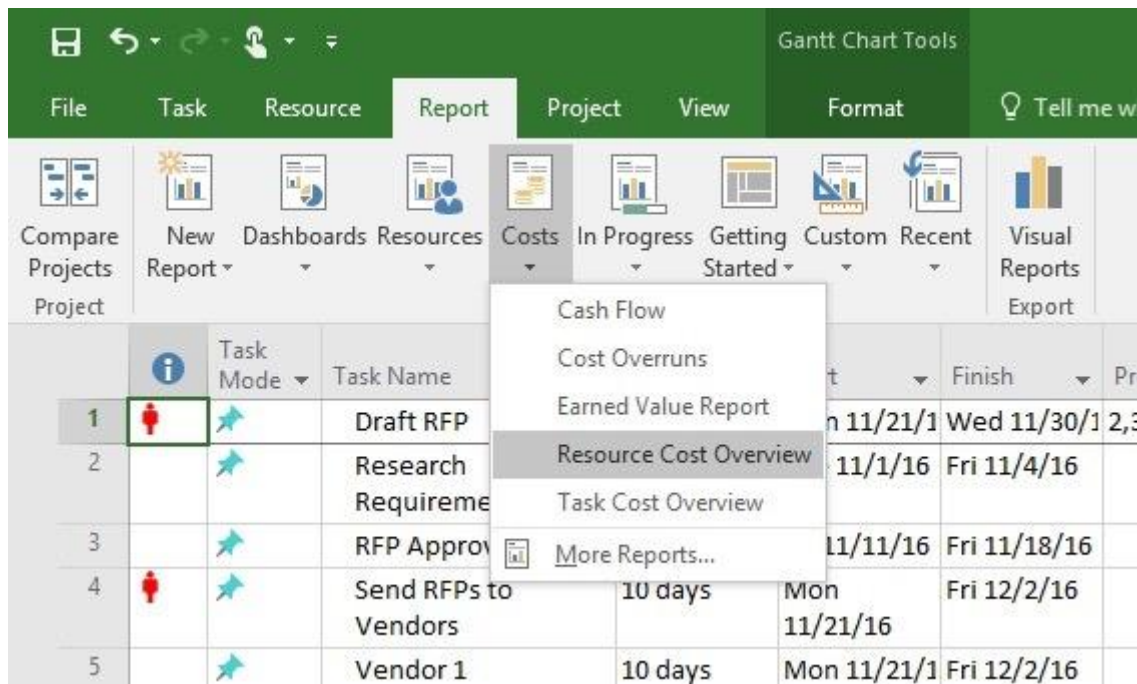
A report like the one below will be generated.

Track the Progress of Your MS Project

With Microsoft Project, you can keep an eye on tasks to see if things are running on time or behind schedule. This will be easy to view as long as you keep the status of tasks updated during the length of your project.

1. Mark Tasks That Are on Track

Click the *Task* tab in the menu bar to see all the task options. Click a task that you want to update. If the task is on track, click the *Mark on Track* button in the ribbon.
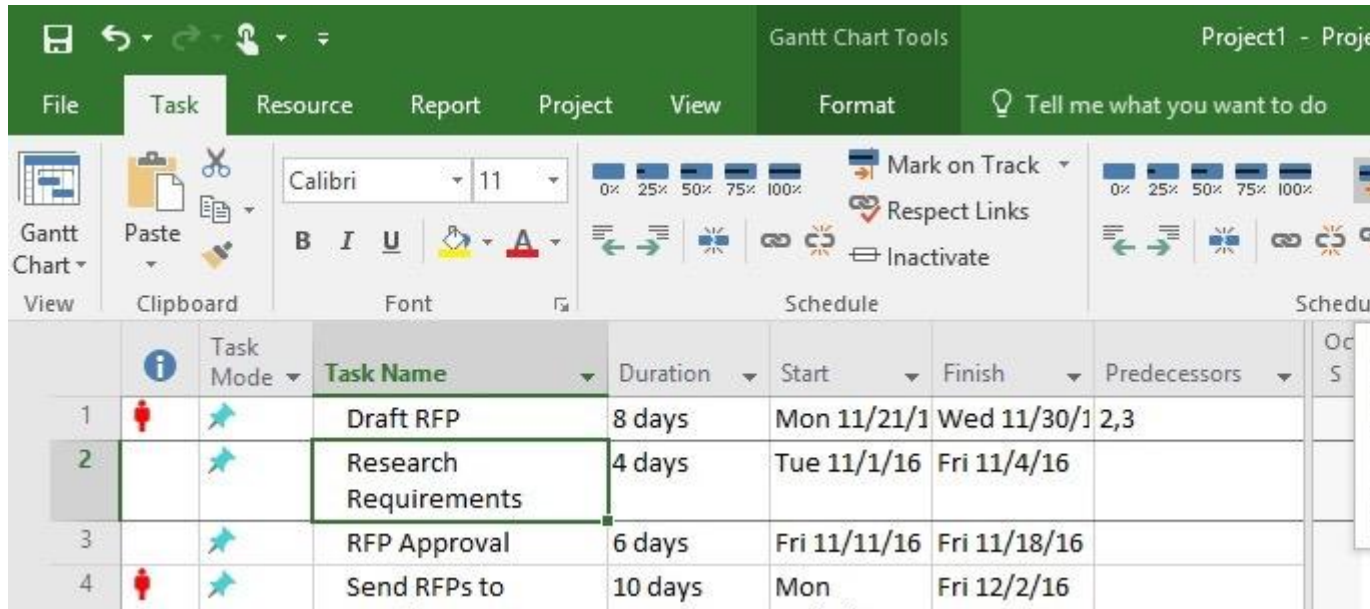

2. Use Predetermined Percentages to Track Tasks

To the left of the *Mark on Track* option, there are percentages that you can use to denote the progress of a task. Click a task to update and click 0%,25%, 50%, 75%, or 100%. You'll see a line drawn through the corresponding bar on the Gantt chart that signifies how much of the task is complete.
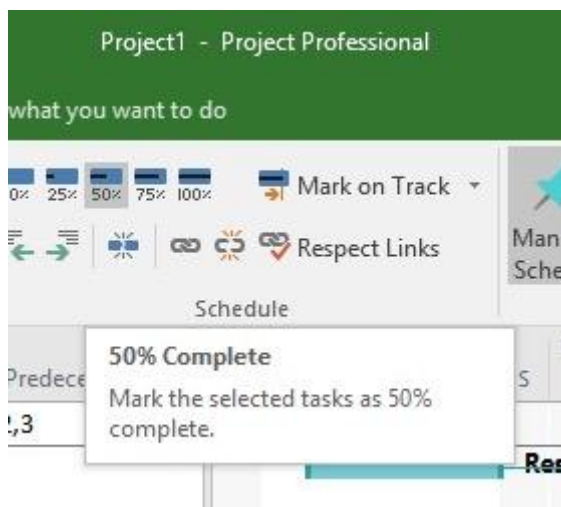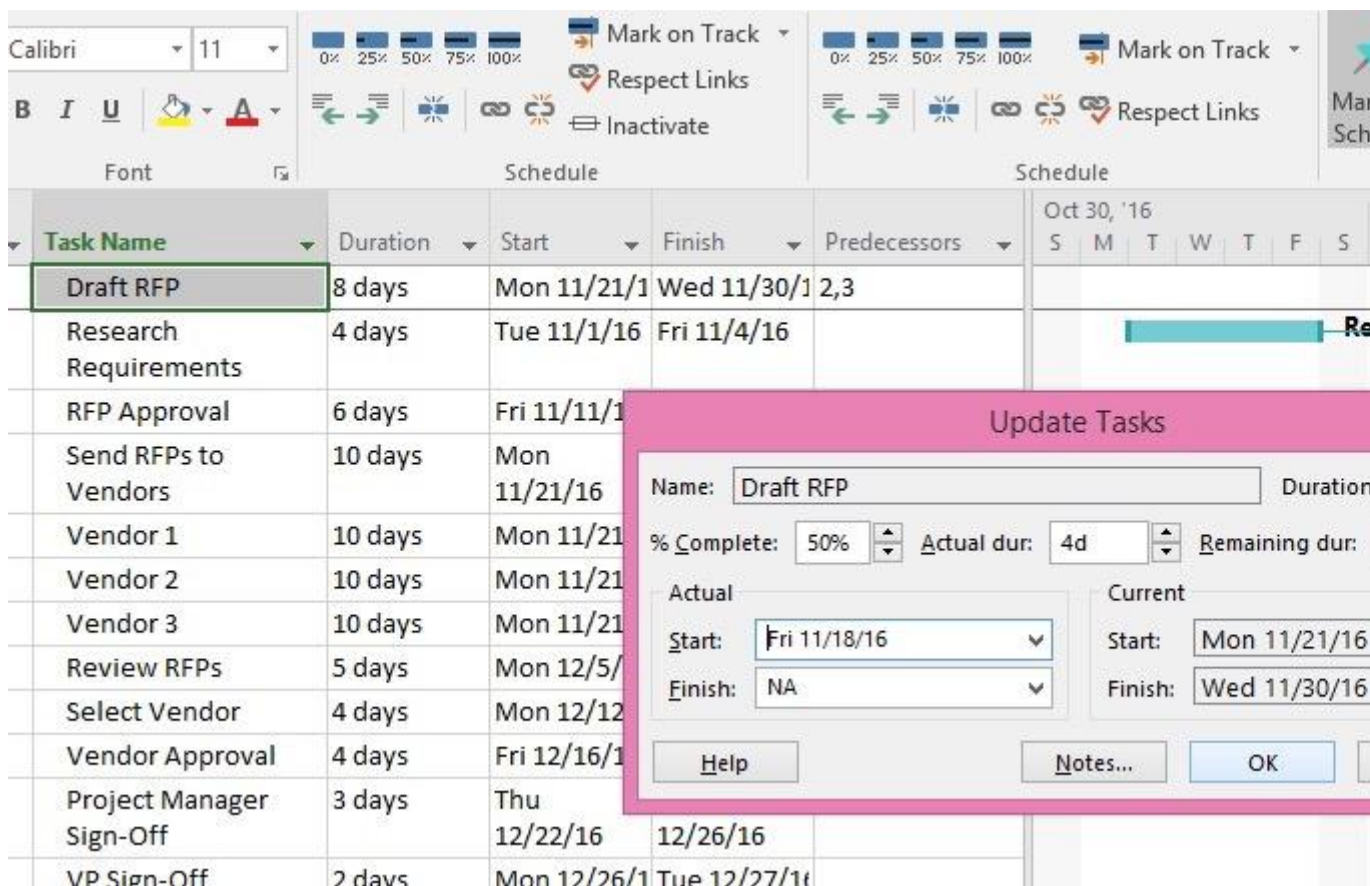

3. Update Tasks

Sometimes tasks fall behind or get accomplished ahead of schedule. You can use the *Update Task* option to update the status. Click the down arrow next to *Mark on Track* and click *Update Tasks*.
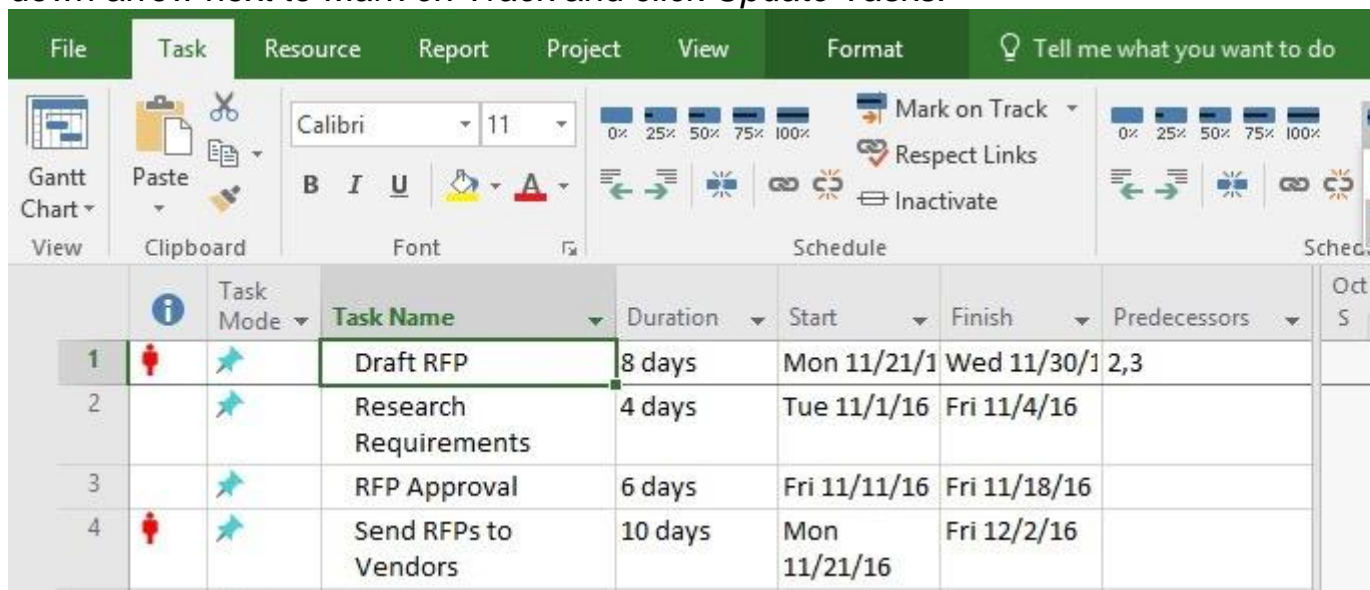
A dialogue box will appear where you can update status and change start and end dates. Make any changes and click OK.

These are all the steps you need to get started and create a project, assign and manage tasks, and run reports in Microsoft Project 2016.