

Microsoft Project Overview

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Brief Bio

- ▶ Project Manager for Healthcare and Finance Industries
- ▶ Instructor at UAB
- ▶ PMP since 2012
- ▶ PMI-ACP since 2018
- ▶ VP of Education, PMICAC



Project Plan Management Options

- ▶ Basecamp
- ▶ Atlassian Jira
- ▶ Smartsheet
- ▶ Zoho Projects
- ▶ Asana
- ▶ CA PPM (Clarity)
- ▶ Excel
- ▶ Microsoft Project



Project Plan Management Wish List

- ✓ Develop project plans
- ✓ Assign resources
- ✓ Track time & progress
- ✓ Create visual timelines (Gantt chart)
- ✓ Create & manage budgets
- ✓ Schedule tasks & resources
- ✓ Balance workloads
- ✓ Create graphical reports
- ✓ Storing project data in a shared database
- ✓ Link to other projects
- ✓ Agile Capability

Why Microsoft Project?

- ▶ 30+ year history and still dominates today
- ▶ 67% of businesses surveyed use MS Project
- ▶ Integrated with Cloud
- ▶ Continuously updating software– including agile functionality now!

Capabilities



Microsoft Cloud Offerings



Why Not Project?

“Things change [in my plan] so often...”

– Target Process

This was me 4 years ago...

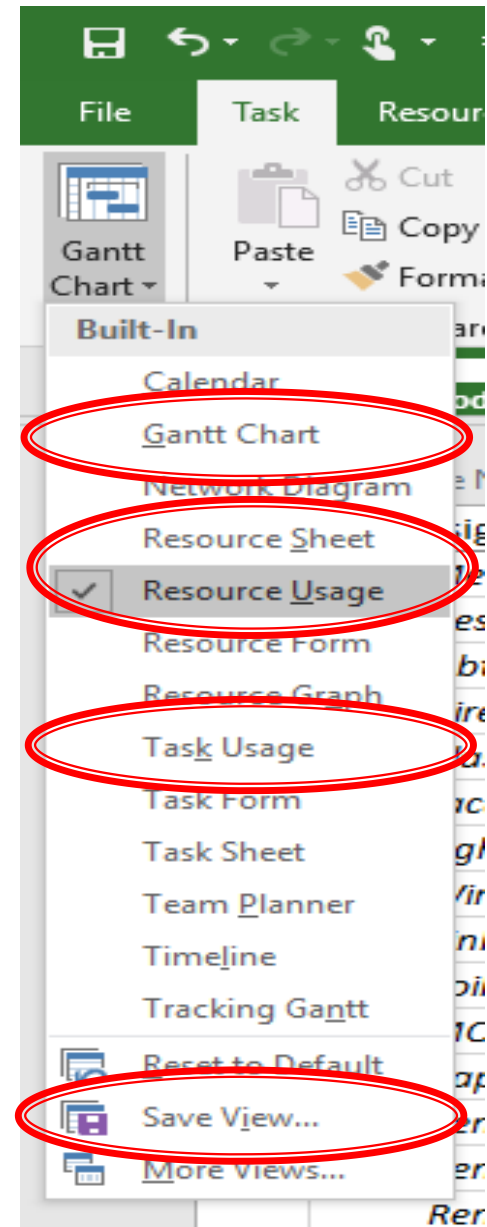
WHEN YOU HEAR THIS:



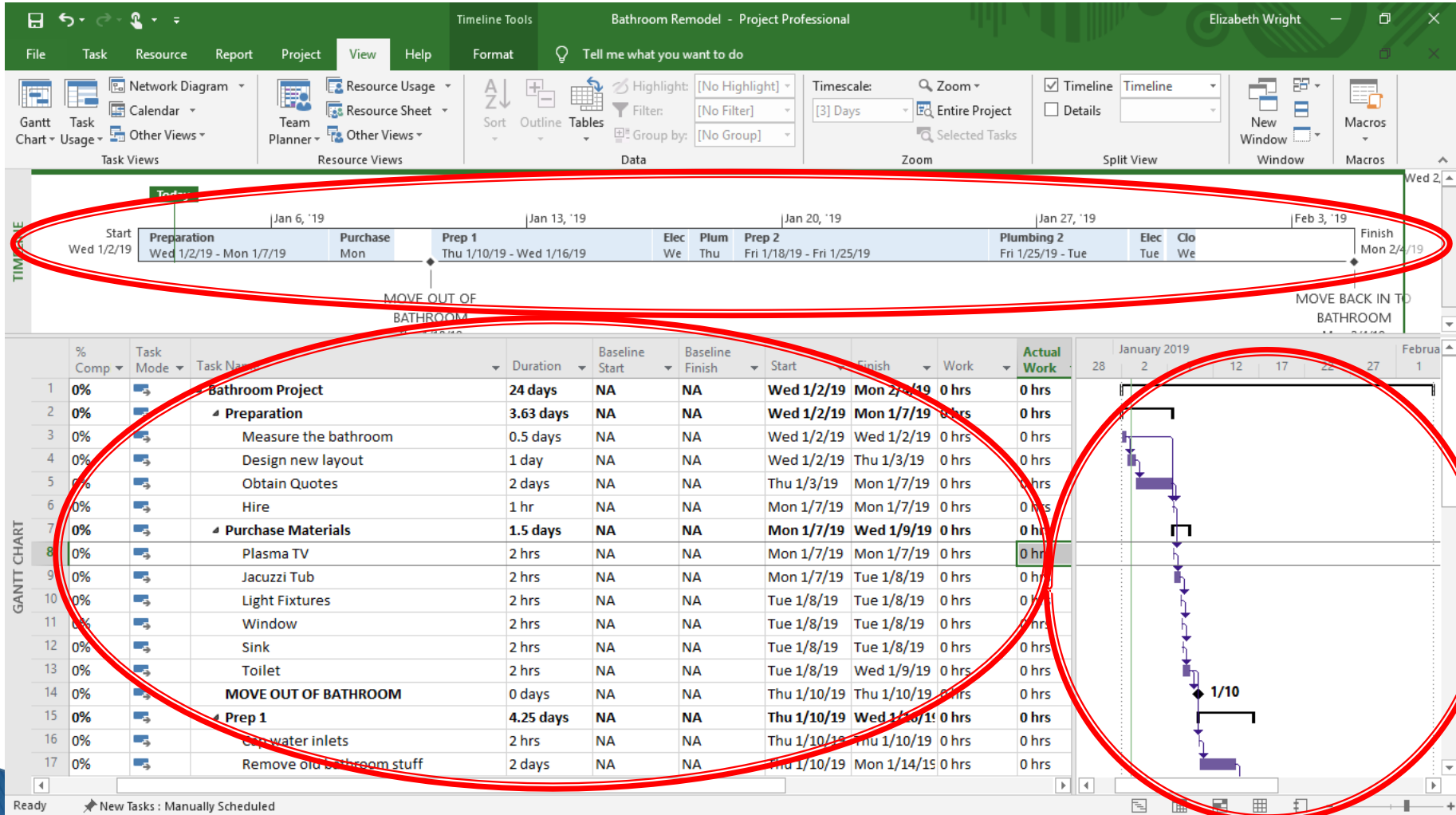
*YOU KNOW YOU'RE IN A
SOFTWARE PROJECT*

Project Basics












- ▶ Gantt Chart
 - “Home” – Default View
- ▶ Resource Sheet
 - Lists Resources and Costs
- ▶ Resource Usage
 - Shows Tasks by Resources
 - Over-Allocation
 - Level Resources
- ▶ Task Usage
 - Show Resources by Task
 - Work Breakdown



Gantt View- "Home"



Gantt View- Continued

		% Comp	↑	Task Name	Duration	Baseline Start	Baseline Finish	Start	Finish
1		12%		Bathroom Project	24 days	Wed 1/2/19	Mon 2/4/19	Wed 1/2/19	Mon 2/4/19
2		69%		Preparation	3.63 days	Wed 1/2/19	Mon 1/7/19	Wed 1/2/19	Mon 1/7/19
3	<input checked="" type="checkbox"/>	100%		Measure the bathroom	0.5 days	Wed 1/2/19	Wed 1/2/19	Wed 1/2/19	Wed 1/2/19
4	<input checked="" type="checkbox"/>	100%		Design new layout	1 day	Wed 1/2/19	Thu 1/3/19	Wed 1/2/19	Thu 1/3/19
5		50%		Obtain Quotes	2 days	Thu 1/3/19	Mon 1/7/19	Thu 1/3/19	Mon 1/7/19
6		0%		Hire	1 hr	Mon 1/7/19	Mon 1/7/19	Mon 1/7/19	Mon 1/7/19
7		0%		Purchase Materials	1.5 days	Mon 1/7/19	Wed 1/9/19	Mon 1/7/19	Wed 1/9/19
8		0%		Plasma TV	2 hrs	Mon 1/7/19	Mon 1/7/19	Mon 1/7/19	Mon 1/7/19
9		0%		Jacuzzi Tub	2 hrs	Mon 1/7/19	Tue 1/8/19	Mon 1/7/19	Tue 1/8/19
10		0%		Light Fixtures	2 hrs	Tue 1/8/19	Tue 1/8/19	Tue 1/8/19	Tue 1/8/19

Work	Actual Work	Remaining Work	Resource Names	Predecessors	Ad
149 hrs	20 hrs	129 hrs			
29 hrs	20 hrs	9 hrs			
4 hrs	4 hrs	0 hrs	You		
8 hrs	8 hrs	0 hrs	You	3	
16 hrs	8 hrs	8 hrs	You	4	
1 hr	0 hrs	1 hr	You	5,3	
0 hrs	0 hrs	0 hrs			
0 hrs	0 hrs	0 hrs	Plasma TV[1]	6	
0 hrs	0 hrs	0 hrs	Jacuzzi Tub[1]	8	

Gantt View- Continued

% Compl	Task Name	Baseline	Baseline	Actual					
14%	Bathroom Project								
69%	Preparation								
100%	Measure the bathroom								
100%	Design new layout								
50%	Obtain Quotes								
0%	Hire								
0%	Purchase Materials								
0%	Plasma TV								
0%	Jacuzzi Tub								
0%	Light Fixtures								
0%	Window								
0%	Sink								
0%	Toilet								
0%	MOVE OUT OF BATHROOM								
6%	Prep 1								
100%	Cap water inlets								
0%	Remove old bathroom	2 days	Thu 1/10/19	Mon	Thu 1/10/19	Mon	16 hrs	0 hrs	1

Task Information

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name: Measure the bathroom Duration: 0.5 days Estimate

Constrain task

Deadline: NA

Constraint type: **As Soon As Possible** Constraint date: NA

Task type: Effort driven

Calendar: Scheduling ignores resource calendars

WBS code: Earned value method: Mark task as milestone

Help OK Cancel

Gantt View- Continued

	% Compl	Task Mode	Task Name	Duration	Baseline Start
	0%		▾ Bathroom Project		
	0%		▾ Preparation		
	0%		Measure the bath		
	0%		Design new layout		
	0%		Obtain Quotes		
	0%		Hire		
	0%		▾ Purchase Materials		
	0%		Plasma TV		
	0%		Jacuzzi Tub		
	0%		Light Fixtures		
	0%		Window		
	0%		Sink		
	0%		Toilet		
	0%		MOVE OUT OF BATH		
	0%		▾ Prep 1		
	0%		Cap water inlets		
	0%		Remove old bathr		
	0%		Remove tiles and wall coverings	0.5 days	NA


Task Information

General | Predecessors | Resources | Advanced | Not

Name: Design new layout

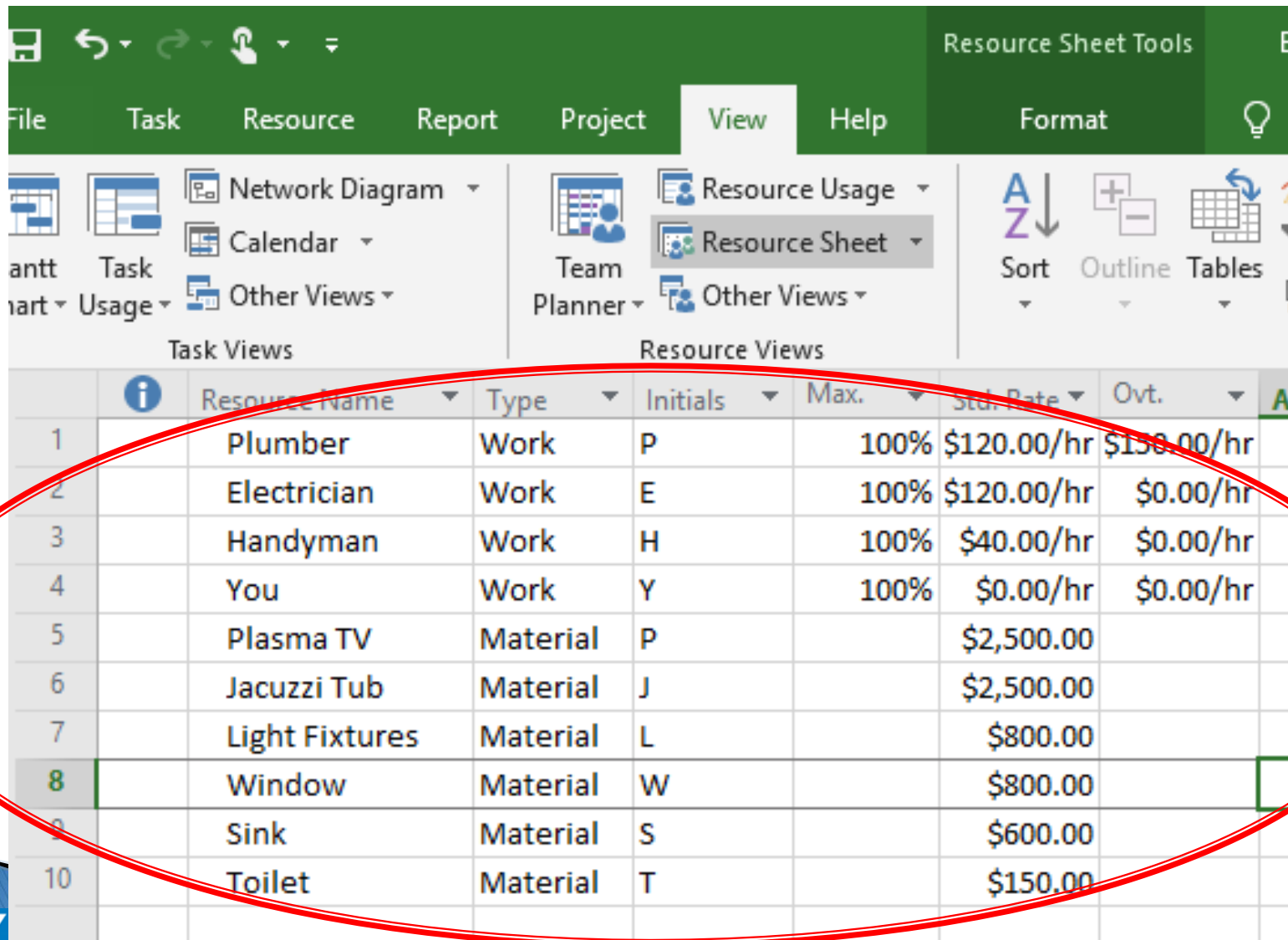
Notes:

Goal:



[Help](#)

Resource Sheet View



The screenshot displays the Microsoft Project interface in the Resource Sheet view. The ribbon includes File, Task, Resource, Report, Project, View, Help, Format, and Resource Sheet Tools. The View ribbon is active, showing options for Task Views (Network Diagram, Calendar, Other Views) and Resource Views (Resource Usage, Resource Sheet, Other Views). The Resource Sheet Tools ribbon includes Sort, Outline, and Tables. The main area shows a table with columns for Resource Name, Type, Initials, Max., Std. Rate, and Ovt. A red oval highlights the table content.

	Resource Name	Type	Initials	Max.	Std. Rate	Ovt.
1	Plumber	Work	P	100%	\$120.00/hr	\$150.00/hr
2	Electrician	Work	E	100%	\$120.00/hr	\$0.00/hr
3	Handyman	Work	H	100%	\$40.00/hr	\$0.00/hr
4	You	Work	Y	100%	\$0.00/hr	\$0.00/hr
5	Plasma TV	Material	P		\$2,500.00	
6	Jacuzzi Tub	Material	J		\$2,500.00	
7	Light Fixtures	Material	L		\$800.00	
8	Window	Material	W		\$800.00	
9	Sink	Material	S		\$600.00	
10	Toilet	Material	T		\$150.00	

Resource Usage View

The screenshot displays the Resource Usage View in Microsoft Project. The top toolbar shows the 'All Resources' dropdown menu. The resource list on the left includes:

Resource Name	Group
Burchfield Pamela	CS
Butler Jeffrey	DSN
Calabrese Heather	
Chakrobty Subhashish	Contractor
Coleman Edward	CS
Cripps Ronald	SA
Cubler Alan	MGR
DeGiulio Rosina	TC
Deperto Ronald	CS
DEV	OTHER
DEV1	OTHER
DEV2	Other
DEV3	Other
DEV4	Other
DEV5	Other
Dhankad Deenak	Contractor

The Gantt chart on the right shows resource usage for tasks M, T, and W. A red circle highlights the data for task W:

Resource	M	T	W
DeGiulio Rosina	13h	13h	10h
DEV	0.65h	0.65h	0.65h
DEV1	2.2h	0.2h	0.2h
DEV4	0.52h	0.52h	0.52h
DEV5	0.75h		

Task Usage

View | Clipboard | Font | Schedule | Tasks | Insert

TASK USAGE

Task Mode	Task Name	Work	Actual Work	Remaining Work	Duration	Details	Wed 1/23 W	Thu 1/24 T	Fri 1/25 F	Sat
30	Plaster walls ready for tiling	24 hrs	16 hrs	8 hrs	3.38 days	Work	8h	6h	2h	
	Handyman	24 hrs	16 hrs	8 hrs		Act. W	8h	6h	2h	
						Work	8h	6h	2h	
						Act. W	8h	6h	2h	

TASK DETAILS FORM

Name: Plaster walls ready for tiling Duration: 3.38 days Effort driven Manually Scheduled

Dates: Start: Wed 1/23/19 Finish: Mon 1/28/19 Constraint: As Soon As Possible Task type: Fixed Units WBS code: 1.7.1

Priority: 500 % Complete: 70%

Current Baseline Actual

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
3	Handyman	100%	24h	0h	24h	16h	8h

Resource selection dropdown menu:

- Electrician
- Handyman
- Jacuzzi Tub
- Light Fixtures
- Plasma TV
- Plumber
- Sink
- Toilet
- Window
- You

Reports

COST OVERVIEW

WED 1/2/19 - MON 2/4/19

COST

\$15,230.00

REMAINING COST

\$15,150.00

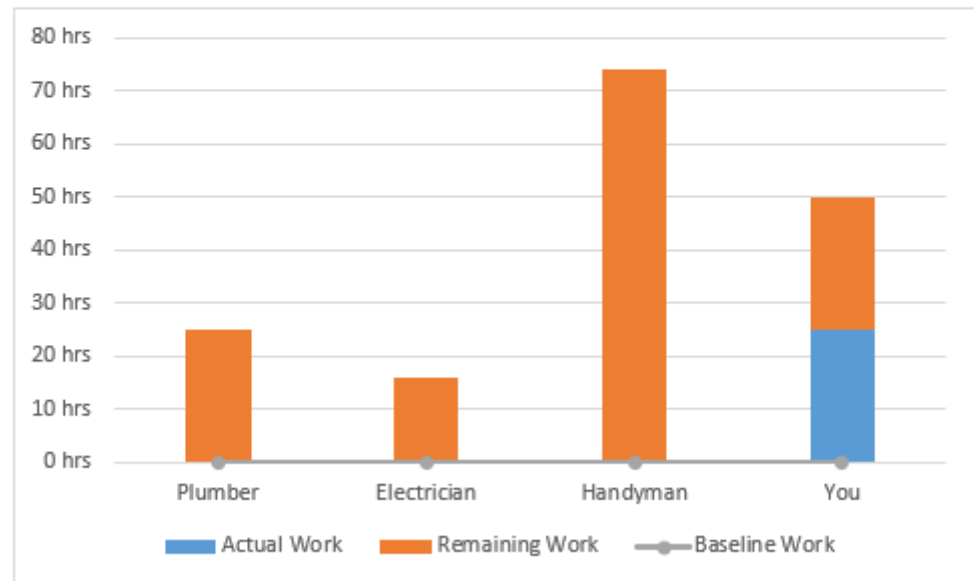
% COMPLETE

14%

RESOURCE OVERVIEW

RESOURCE STATS

Work status for all work resources.



Top 10 Tips for using Project

10. Use Auto Scheduled Tasks

9. Use Constraint–
As Soon As Possible



8. Use Fixed Units Task Type

7. Customize your views

Top 10 Tips for using Project

6. Smooth out Resources' Work

5. Baseline your project initially and with each CCN

4. Always CLEAR remaining work before marking a task 100% complete



Top 10 Tips for using Project

3. Understand Project's logic

2. Watch your actuals and dates

1. Frustrations might just be....

USER ERROR



Want to learn more?

- ▶ UAB Microsoft Project Workshop
 - Saturday, March 9, 2019
 - 8:00 a.m. to Noon
 - UAB Collat School of Business

- ▶ Registration link found on PMICAC.org or uab.org/business

References

▶ Project Alternatives:

- <https://thedigitalprojectmanager.com/microsoft-project-alternatives/>

▶ Project Pros and Cons:

- <https://www.softwareadvice.com/resources/microsoft-project-pros-and-cons-for-smbs/>