

Overview

This Job Aid defines the steps to follow to develop the project schedule in Project for the web.

There are five (5) core actions required to develop the project schedule.

- 1. Build the team
- 2. Identify the work
- 3. Assign resources
- 4. Estimate the work
- 5. Establish dependencies

Build the team



1. ASSIGN TEAM MEMBERS TO MICROSOFT 365 GROUP

- a. Open the project schedule in **Project for the web**.
- b. Click Group Members from the top right corner.

	Project					٢	۵	?	
⊨	Mobilize Sales Team	Grid	Board	Timeline	𝕂 🖪	g ^R G	roup me	mbers	
ல்	May 4 - Aug 14								J

- c. Based on organizational group policies Create group (recommended) or Add to group.
- d. Search for and select the team members and stakeholders.



e. Click **Create** to create team as a Microsoft 365 group.

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Project for the web

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Identify the work using the Timeline view

0 **Project Manager**

Project for the web

CAPTURE PROJECT DELIVERABLES 1.

- Open project schedule in **Project for the web**. a.
- Click **Timeline** from the ribbon. b.



Create a project start milestone as the first line in the new schedule. Replace "Add new task' with a project start C. milestone.



d. Hover your mouse over the milestone name to activate the **i lcon** and click on it to open the task pane.

	Project		
≡	Mobilize	e Sales Team Grid	Board Timeline
ŵ	Apr 14 - Apr 14	4	
~	Aug 2	23	Aug 20
	1 ()	Project start mileseto	<u>i</u> :
	0	Name	Open details (Alt+I) Assigni

Set the **Duration to zero** to make it a Milestone. е

Assign to	tart milese	etone			
Add a note					
Start		Finish			
04/14/2020		04/14/2	2020		
Duration		% Comp	lete		
0 days		E			
Bucket		1			
Bucket 1	\sim				
✓ Effort					
Completed	Remainin	9	Total		
E.g. "8h"	+ E.g. "8h"		= E.g. "	16h"	
Depends on					
This task doesn't d	epend on othe	er tasks			

- Define the first phase of the project by typing the phase name in the 'Add new task' area. f.
- Continue to add the first **deliverables** in the same way. g.

	Project			
= ŵ	Mobilize Sales Team Apr 14 - Apr 14	Grid	Board	Timeline
~	Aug 23		Aug 3	30
	1 O Project start mileseto	ne	_	
	Project kickoff			
	G + Add new task			

- h. Hover your mouse over the deliverable name to activate the ellipsis and click on them to open the task sub-menu
- Click **Indent task** to make it a "child" of the Phase. i.

	Project	
= ☆	Mobilize Sales Team Apr 14 - Apr 14	Grid Board Timeline
~	Aug 23	Aug 30
	1 O Project start mileseton	ne
	2 O Project kickoff	
	3 O Project Norma and Col	olla 🕂 🕕 🗄 🖙 Scroll to task
	+ Add new task	 Open details
		→ Make subtask
		🐰 Cut task
		🗅 Copy task
		🛱 Paste task
		> Insert task above
		🗊 Delete task
		Copy link to task
		담 Add dependency
		□ ^x Remove dependencies
		Ocomplete task

Continue to add Milestones, Phases and Deliverables in the same way. j.

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2. CAPTURE PROJECT SUB-DELIVERABLES

- a. With the Phases, Deliverables and Milestones identified, the high-level Work Breakdown Structure (WBS) is complete. Now we need to decompose the WBS into sub-deliverables (if needed) and tasks (to be discussed in the next section).
- b. Insert a new line between the first two deliverables by selecting the second deliverable.
- c. Hover your mouse over the deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**.
- d. Click **Insert task above** to add the sub-deliverable.



- e. Hover your mouse over the new sub-deliverable and select the ellipsis to open the task sub-menu.
- f. Click Make subtask to make it a sub-deliverable.

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g. Continue to decompose the WBS as required.

3. CAPTURE PROJECT TASKS

- a. The final level of decomposition is to decompose the sub-deliverables into **detailed tasks**.
- b. Insert a new line between the first two sub-deliverables by selecting the second sub-deliverable.
- c. Hover your mouse over the sub-deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**.
- d. Click Insert task above to add the first task.

	Project								
=		bilize	e Sales Team	Grid	Board	Timel	ine		
~									
		Aug			Aug	30			
	1	0	Project start milese	tone					
	2 VProject kickoff 3 VProject Norms and Collaboration Plan								
			Plan						
	4	0	Project Site ar	nd Work Ho	urs				
в	5	0	Project Collab	oration Nor	rms () :	C	to task	
	6	0	Project Manager	ment Plan		-	() Open	details	
	7	0	Project Acceptar	nce Process	and Pro	cedures	→ Make	subtask	
		+	Add new task				← Prom	ote subtask	
							χ Cut ta	ask	
							🖒 Copy	task	
							📋 Paste	task	
) Insert	t task above	
							前 Delet	e task	
							ල Copy	link to task	
							다 Add	dependency	
							Remo	ve depender	ncies
							⊘ Com;	olete task	

- e. Enter the new task and then hover your mouse over the new task and select the ellipsis to open the task sub-menu.
- f. Click Make subtask to make it a sub-deliverable.

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Creating the project schedule in Project for the web



g. Continue to decompose the WBS as required.

Identify the work using the Board view

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1. CONFIGURE THE BOARD

- a. Open project schedule in **Project for the web**.
- b. Click **Board** from the ribbon.

	Project
≡	Mobilize Sales Team
ŵ	Apr 14 - Apr 14

c. Configure the board by creating **buckets** (columns, Kanban processes) as appropriate for the project delivery approach by clicking **Add Bucket** and giving the new bucket an appropriate name.

≡ 2	Mobilize Sales Team	Grid Board Timeline	
/	Bucket 1	Sprint 1	Add bucket
	O Enter a task name	+ Add task	
	Finish		
	Assign to		

d. Continue to add buckets until the board is fully defined.

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2. CAPTURE STOIES

- a. Capture the first story for the project by clicking **Add task** from the appropriate column and capture the story.
- b. Click Add Task.

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≡ ∂	Mobilize Sales Team G Apr 14 - Apr 14	rid Board Timeline		
~ _	Bucket 1	Sprint 1	Sprint 2	
	+ Add task	O Enter a task name	+ Add task	
		Finish		
		Assign to		

c. Continue to add stories to the project in the same way.

3. ORGANIZE THE BOARD

a. Ensure the stories are in the correct column/bucket by dragging and dropping them into the appropriate location.

	Project			
≡	Mobilize Sales Team Gric	Board Timeline		
☆	Bucket 1	Sprint 1	Sprint 2	
	+ Add task	+ Add task	+ Add task	
		Capture cu A diress	Validate zip code ····	
		Capture c astomer name		

Identify the work using the Grid view

Project Manager

Project for the web

1. CAPTURE PROJECT DELIVERABLES

- a. Open project schedule in **Project for the web.**
- b. Click **Grid** from the ribbon.



c. Create a **project start milestone** as the first line in the new schedule. Replace "Add new task' with a project start milestone.

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- d. Ensure that the **Duration column** is visible.
- e. Select Add column to add it is necessary.

	Project	
=	Mobilize Sales Team Grid Board Timeline	
ŵ	Apr 14 - Apr 14	
~	Name 🗸	Duration V Assigned to V % complete V Start V Finish V E + Add column
	1 O Project start milestone	0%
	+ Add new task	

f. Set the Duration to zero to make it a Milestone.

	Project	
=	Mobilize Sales Team Grid Board Timeline	
ல்	Apr 14 - Apr 14	
~	Name V	Duration \vee
	1 O Project start milestone	0 days
	○ Name	Duration

- g. Define the first **phase** of the project by typing the phase name in the 'Add new task' area.
- h. Continue to add the first **deliverable** in the same way.



- i. Hover your mouse over the deliverable name to activate the **ellipsis** and click on it to open the **task sub**menu.
- j. Click **Indent** task to make it a "child" of the Phase.



	Project	
= ∂	Mobilize Sales Team Grid Board Timeline	
	Name 🔨	Duration \checkmark Assi
	1 O YProject start milestone	
	2 O Project Kickoff	
	3 O Project Norms and Collaboration) : i Open details
	+ Add new task	→ Make subtask J
		← Promote subtask
		χ Cut task
		🗅 Copy task
		🛅 Paste task
		> Insert task above
		🗊 Delete task
		Copy link to task
		Fair Add dependency
		□ [×] Remove dependencies
		⊘ Complete task

Continue to add Milestones, Phases, and Deliverables in the same way. k.

	Project
=	Mobilize Sales Team Grid Board Timeline
ŵ	Apr 14 - Apr 14
~	Name 🗠
	1 O VProject start milestone
	2 O VProject Kickoff
	3 O Project Norms and Collaboration ① :
	K Add new task

2. CAPTURE PROJECT SUB-DELIVERABLES

- With the Phases, Deliverables and Milestones identified, the high-level Work Breakdown Structure (WBS) is complete. a. Now we need to decompose the WBS into sub-deliverables (if needed) and tasks (to be discussed on the next section).
- b. Insert a new line between the first two deliverables by selecting the second deliverable.
- Hover your mouse over the deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**. C.
- Click **Insert t**ask above to add the sub-deliverable. d.

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	14 - Apr	e Sales Team Grid Board Timeline		
		Name 🗸		Duration \vee
1	0	✓ Project start milestone		
2	0	✓ Project Kickoff		
3	0	Project Norms and Collaboration	_	
4	0	Project Management Plan (D :	Cdetails
5	0	Project Acceptance Process and Procedures		→ Make subtask
	+	Add new task		i← Promote subtas
				ι Cut task
				🗅 Copy task
				🛱 Paste task
			D	>믐 Insert task abov
				🗓 Delete task
				ூ Copy link to tas
				명 Add dependend
				다. Remove depend
				 Complete task

- e. Hover your mouse over the new sub-deliverable and select the ellipsis to open the task sub-menu.
- f. Click Make subtask to make it a sub-deliverable.

	obiliz 14 - Apr	e Sales Team Grid Board Timeline	
		Name 🗸	Duration \lor
1	0	✓ Project start milestone	
2	0	✓ Project Kickoff	
3	0	Project Norms and Collaboration	
4	0	Project Sites and Work Hours	: Open details
5	0	Project Management Plan	→ Make subtask
6	0	Project Acceptance Process and Procedures	← Promote subtask
	+	Add new task	X Cut task
			Copy task
			Paste task
			> Insert task above
			🗓 Delete task
			👁 Copy link to task
			r Add dependency
			다. Remove dependenc
			 Complete task

g. Continue to decompose the WBS as required.

3. CAPTURE PROJECT TASKS

- a. The final level of decomposition is to decompose the sub-deliverables into detailed tasks.
- b. Insert a new line between the first 2 sub-deliverables by selecting the second sub-deliverable
- c. Hover your mouse over the sub-deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**.
- d. Click Insert task above to add the first task.



**	Projec	t									
= ଜ		biliz 4 - Apr 1	e Sales Team	Grid Board	Tim	eline					
~			Name 🗸							Duration \vee	Assig
	1	\bigcirc	✓ Project start milest	one							
	2	\bigcirc	∽ Project Kickoff								
	3	\bigcirc	✓ Project Norms	and Collaborati	on						
	4	0	Project Sites	and Work Hours							
В	5	0	Project Colla	boration Norms			0	÷		C details	
	6	0	Project Manage	ement Plan					→	Make subtask	
	7	\bigcirc	Project Accepta	ance Process and I	Proced	lures			⊷	Promote subtask	
		+	Add new task						χ	Cut task	
									-	Copy task	
										Paste task	7
							D		_	Insert task above	
									-	Delete task	
										Copy link to task	
										Add dependency	
										Remove depender	ncies
									\odot	Complete task	

- e. Identify the first task, and then hover your mouse over the new task and select the ellipsis to open the task sub-menu.
- f. Click **Make subtask** to make it a sub-deliverable.

	Proje	ct		
= ⋒		obiliz 14 - Apr 1	e Sales Team Grid Board Timeline	
~			Name 🗸	Duration \checkmark Assig
	1	0	✓ Project start milestone	
	2	0	✓ Project Kickoff	
	3	\bigcirc	✓ Project Norms and Collaboration	
	4	0	Project Sites and Work Hours	
E	5	0	Define core work hours for each site ① :	 Open details
	6	0	Project Collaboration Norms	→ Make subtask
	7	0	Project Management Plan	← Promote subtask
	8	0	Project Acceptance Process and Procedures	χ Cut task
		+	Add new task	Copy task
				Paste task
				> Insert task above
				Delete task
				Copy link to task
				Fail Add dependency
				Remove dependencies
				 Complete task

g. Continue to decompose the WBS as required.

Assign Resources

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1. ASSIGN RESOURCES IN THE TIMELINE VIEW

- a. Ensure you have the appropriate project open in **Project for the web** and ensure you are in the **Timeline** view.
- b. Hover your mouse to the immediate left of the Gantt bar left hand border to show the **hidden add resource icon** and click it.

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c. Search for and **add the team member(s)** to the task.

2. ASSIGN RESOURCES IN THE BOARD VIEW

- a. Ensure you have the appropriate project open in **Project for the web** and ensure you are in the **Board** view.
- b. Hover your mouse over the card to show the **ellipsis** and click on it and then select **Assign task**.



c. Search for and add the team member(s) to the task.



3. ASSIGN RESOURCES GRID VIEW

- a. Ensure you have the appropriate project open in **Project for the web** and ensure you are in the **Grid** view.
- b. Ensure that the Assigned to column is visible
- c. Select Add column to add Assigned to if needed.

	Project
=	
ŵ	Apr14 - Apr14
~	Name ✓ B Assigned to ✓ Duration ✓ % complete ✓ Start ✓ Finish ✓ C + Add column
	1 O V Project start milestone 0%
	2 🔿 🗸 Project Kickoff 0%
	3 O VProject Norms and Collaboration 0%
	4 O Project Sites and Work Hours 0%
	5 O Define core work hours for each site 0%
	6 O Project Collaboration Norms 0%
	7 O Project Management Plan 0%
	8 O Project Acceptance Procedures 0%

- d. Click in the Assigned to column and select the Add Resource icon
- Search for and add the team member(s) to the task. e.

	Projec	t			
≡ ஓ		biliz 4 - Apr 1	e Sales Team Grid Board Timeline		
~			Name 🗸	Assigned to \checkmark	Dur
	1	0	✓ Project start milestone		
	2	0	✓ Project Kickoff		
	3	0	~ Project Norms and Collaboration		
	4	0	Project Sites and Work Hours		
	5	0	Define core work hours for each site	Enter text to search.	
	6	$^{\circ}$	Project Collaboration Norms	Other team resources	
	7	$^{\circ}$	Project Management Plan	E 🕅 Deirdre Rogusky	
	8	0	Project Acceptance Process and Procedures	Bob Banker	
		+	Add new task	•	

Estimate the work

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1. ESTIMATING THE WORK IN THE GRID VIEW

- a. Ensure you have the appropriate project open in **Project for the web** and the **Grid view** selected.
- b. Ensure that you have the **Effort** and **Duration** columns visible.
- Click **Add column** to add one or both columns as needed. C.

	Project						
= ☆	Apr 14 - Apr 14 Grid Board Timeline						
~	Name 🗸	B Effort ∨	Duration \checkmark	% complete 🗸	Start 🗸	Assigned to \checkmark	Finish \checkmark C + Add column
	1 O YProject start milestone			09	6		
	2 O YProject Kickoff			09	6		
	3 O Project Norms and Collaboration			0%	6		
	4 O Project Sites and Work Hours			09	6		
	5 O Define core work hours for each site			09	6		
	C O Desired Callebrandian Name			09	4		

- d. Enter the task estimate in the Effort column based on estimating the amount of work required to complete the task or
- e. In the Duration column based on estimating how long the task will take.

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Creating the project schedule in Project for the web

	Project		
≡	Mobilize Sales Team Grid Board Timeline		
ŵ	Apr 14 - Apr 20		
~	Name 🗡	Effort \checkmark	Duration \smallsetminus
	1 O Y Project start milestone	40 hours	5 days
	2 O VProject Kickoff	40 hours	5 days
	3 O Project Norms and Collaboration	40 hours	5 days
	4 O Project Sites and Work Hours	D 40 hours	1 day
	5 O Define core work hours for each site	E	5 days

2. ESTIMATING THE WORK IN THE TASK PANE

- a. Ensure you have the appropriate project open in Project for the web.
- b. In any view, hover your mouse over a task to activate the i icon and select it to open the task pane.

	Project
=	Mobilize Sales Team Grid Board Timeline
ŵ	Apr 14 - Apr 20
~	Name 🗠
	1 O YProject start milestone
	2 O VProject Kickoff
	3 O Project Norms and Collaboration
	4 O Project Sites and Work Hours B ① :
	5 O Define core work hours for each site

- c. Enter the task estimate in the **Effort remaining box** based on estimating the amount of work required to complete the task or
- d. In the Duration box based on estimating how long the task will take.

	2 ··· ×
Project Norms and Collaboration	
\bigcirc Project Sites and Work Hours	
A, Assign to	
Add a note	
Start Finish	
04/14/2020 04/14/2020	
Duration <u>y</u> plete	
1 day	
Bucket	
Bucket 1 \checkmark	
✓ Effort	
Completed Remaining Total	
0 hours - 40 hours = 40 h	iours

Establish dependencies

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1. CREATNG DEPENDENCIES IN THE TIMELINE VIEW

- a. Ensure you have the appropriate project open in Project for the web and the Timeline view selected.
- b. Hover your mouse over the end of the Gantt bar for the successor, and then click and drag to the beginning of the successor task
- c. And release the mouse to create the dependency.

	Project	
=	Mobilize	Sales Team Grit Timeline
ώ	Apr 14 - Apr 20	Apr 5d Apr
~	Mar 29	Apr 5 Apr 12 14 15 16 17 18 19 20
	1 0 ¥	Project start milestone
	2 ()	V Project Kickoff
	з ()	V Project Norms and Collaboration
	4 (Project Sites and Work Hours 🚷
	5 ()	Define core work hours for each site 🛞 🕐
	6 🔘	Project Collaboration Norms
	7 ()	Project Management Plan

- d. Create additional dependencies in the same way.
- e. A single task can have many predecessors and successors

Mar 29 V Project start milestone V Project Kickoff V Project Norms and Project Sites and V		Apr 12	Apr 19	Apr 26
		Ξ		
Project Norms and Project Sites and V		_		
Project Sites and V				
-	Work Hours			
O Define core work h	hours for each site	6		
O Project Collaborati	tion Norms	b		
Mobilize Sales Team Apr 14 - Apr 27	Grid Board Timeline			
Mar 29	Apr 5	Apr 12	Apr 19	Apr 2
1 O VProject start milestor	ne			_
2 O YProject Kickoff				-
	and Collaboration			_
3 O YProject Norms a				
4 O Project Sites a	and Work Hours ork hours for each site	8		
	oject Mobilize Sales Team Apr 14 - Apr 27 Mar 29 1 \crossession \crossession Project start milesto	oject Mobilize Sales Team Grid Board Timeline Apr 14 - Apr 27 Mar 29 Apr 5 1 \crosseq \sigma Project start milestone	oject Mobilize Sales Team Grid Board Timeline Apr 14 - Apr 27	oject Mobilize Sales Team Grid Board Timeline Apr 14 - Apr 27 Apr 3 Apr 12 Apr 19 Mar 29 Apr 5 Apr 12 Apr 19 1

2. CREATNG DEPENDENCIES IN THE GRID VIEW

- a. Ensure you have the appropriate project open in **Project for the web** and the **Timeline view** selected.
- b. Ensure the **Depends on** and **Dependents** columns are visible
- c. Click in Add column to add one or both as needed,

	Project							
=	Mobilize Sales Te Grid Board Timeline							
ណ	Apr 14 - Apr 27							
~	Name 🗸	B Depends on ∨ Dependents (aft.	. V Effort V	Duration \checkmark	Assigned to \checkmark Finish \checkmark	C + Add column		
	1 O VProject start milestone		120 hours	10 days	4/27/20	020		
	2 O V Project Kickoff		120 hours	10 days	4/27/20	020		

d. Click in the **Depends** on column to add a **predecessor** task or

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	Projec	t						
=	Mobilize Sales Team Grid Board Timeline							
ଜ	Apr 1	4 - Apr 3	0					
~			Name \checkmark Depends on \checkmark Dependents (aft \checkmark					
	1	0	∨ Project start milestone	120				
	2	$^{\circ}$	✓ Project Kickoff	120				
	з	$^{\circ}$	 Project Norms and Collaboration 	120				
	4	\bigcirc	Project Sites and Work Hours	4				
	5	$^{\circ}$	Define core work hours for each site	4				
	6	$^{\circ}$	Project Collaboration Norms D Suggested tasks	4				
	7	$^{\circ}$	Project Management Plan 4 Project Sites and Work Hours					
		\bigcirc	Project Accentance Process and Procedures					

e. The **Dependents** column to add a **successor** task.

	Project					
=	Мо	biliz	e Sales Team Grid Board Timeline			
ŵ	Apr 1	4 - Apr 2	o <u> </u>			
~			Name 🗠	Depends on \searrow	Dependents (aft $ \smallsetminus $	Effort \smallsetminus
	1	$^{\circ}$	✓ Project start milestone			120 hours
	2	$^{\circ}$	~ Project Kickoff			120 hours
	3	$^{\circ}$	✓ Project Norms and Collaboration			120 hours
	4 O Project Sites and Work Hours		Г		40 hours	
	5	$^{\circ}$	Define core work hours for each site			40 hours
	6 O Project Collaboration Norms			Suggested tasks		
	7	$^{\circ}$	Project Management Plan	E	6 Project Collaborat	tion Norms
	8 O Project Acceptance Process and Procedures			7 Project Managem	ent Plan	
	+ Add new task			8 Project Acceptanc	e Process and Procedures	

f. Select the appropriate dependency from the **auto-generated list** or **begin typing** a task name or line number to select a different task.

	Project					
= ⊜		bilize 4 - Apr 20	Sales Team Grid Board Timeline			
~			Name \checkmark	Depends on $\!$	Dependents (aft $$	$_{\rm Effort} \sim$
	1	0	Project start milestone			120 hours
	2	0	✓ Project Kickoff			120 hours
	3	0	✓ Project Norms and Collaboration			120 hours
	4	0	Project Sites and Work Hours			40 hours
	5	$^{\circ}$	Define core work hours for each site		wor	40 hours
	6	0	Project Collaboration Norms	F	4 Project Sites and W	ork Hours
	7	0	Project Management Plan			

3. CREATNG DEPENDENCIES IN THE TASK PANE

- a. Ensure you have the appropriate project open in **Project for the web.**
- b. In any view, hover your mouse over a task to activate the **i icon** and select it to open the task pane.



Click Add dependency to add a predecessor task(s). You cannot add successor tasks using the task pane. C.

	$\ \ \sim \ \ \times$					
Project Norms and Collaboration						
O Project Collaboration Norms						
🔍 💰 Bob Banker						
Add a note						
Start	Finish					
04/14/2020	04/20/2020					
Duration	% Complete					
5 days	0					
Bucket						
Bucket 1 🗸						
✓ Effort						
Completed Remaining	ng Total					
0 hours + 40 hou	rs = 40 hours					
Depends on						
This task doesn't depend on other tasks						
Add dependency						

- d. Select the appropriate dependency from the auto-generated list or
- Begin typing a task name or line number to select a different task. e.

