



Microsoft Partner
Gold Project and Portfolio Management
Silver Collaboration and Content
Silver Business Intelligence

What's New in Project Pro 2016

Laura Crawford
9/20/18

Agenda

Introductions and Objectives

What's New in Project Pro 2016

What's New in Project Online

Demo

Q & A and Next Steps

Laura Crawford



Senior PPM Specialist

Laura has over 8 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.



Project



SharePoint



Office 365



Power BI

Why Clients Choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.



Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all



Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.



Sr. Project Manager Consultant, Large Legal Firm

PPM Works Services and Solutions

Each company is unique. One-size-fits-all approaches will never help your business reach its full potential. We deliver custom PPM solutions and services, tailored to you – your industry, your culture, your one-of-a-kind challenges.

Solutions

- Project Online Quick Start
- Industry Solutions
- PMO On-Demand
- Data Warehouse
- Report Pack
- PPM Discovery
- Office 365 Apps
- PPM Verticals
- Custom PPM Solutions

Services

- Project Configuration
- Mentoring And Support
- Project Assessments
- Hands-on Workshops
- Virtual Upgrades
- Power BI And Dashboards
- Microsoft Planning Services
- Training Courses



Learning Objectives

In today's webinar we will learn how to:

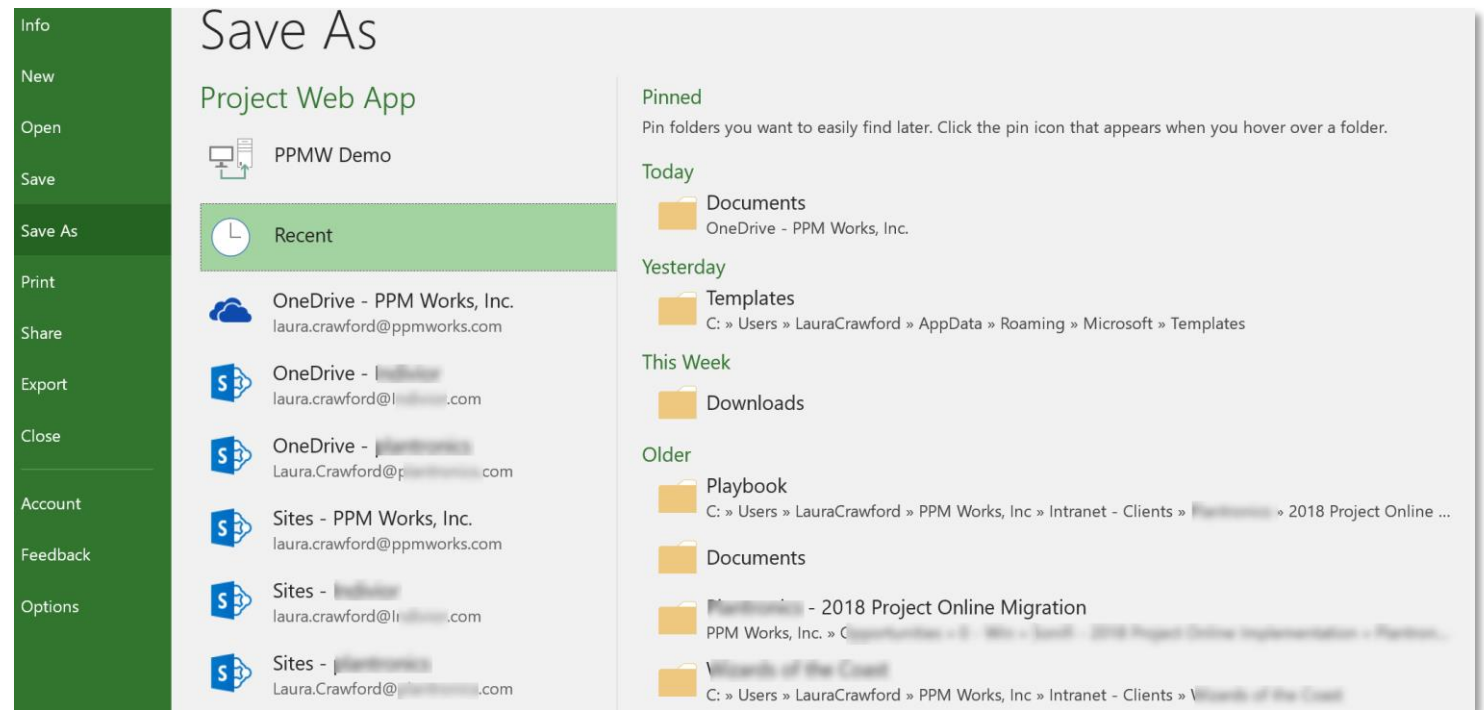
- Save a project to a recent location
- Create Agile projects
- Quickly Update Task Boards
- Link Tasks to Planner
- Set Predecessors using the new drop down feature
- Create multiple timelines
- Insert a Blank Row
- Insert the Task Summary Name field

Recent Save Locations

Project keeps a running list of where you have saved other projects.

To choose a location:

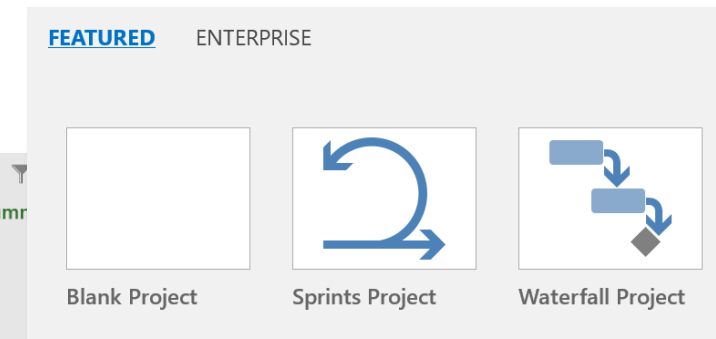
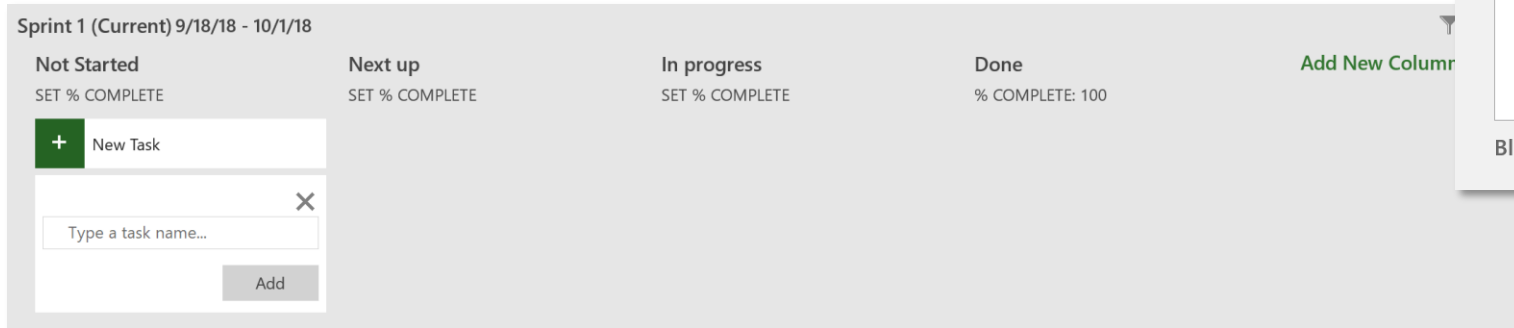
- **File | Save As | Recent**



Agile Project Templates

Project Online subscriber have access to a Sprints Project template in Professional Pro.

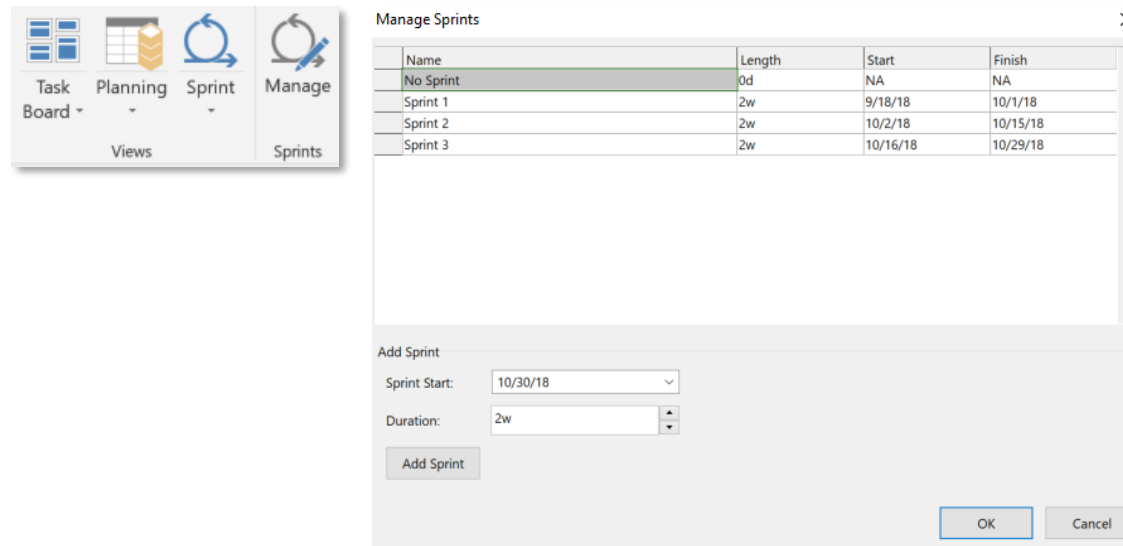
- Open Project Pro
- Select **Sprints Project** under the featured templates



Manage Sprints

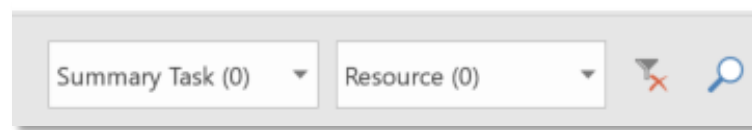
To quickly manage your sprints:

- From the **Sprint Tools** tab select the Sprint ribbon
- Click on **Manage**
- Add, update, or delete Sprints

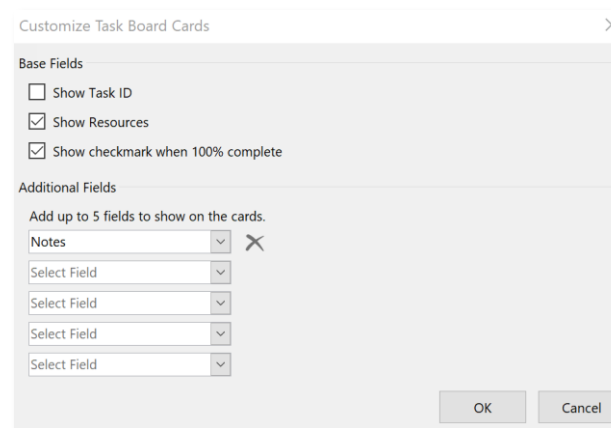
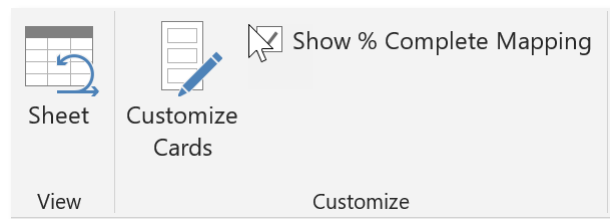


Improved Task Board Cards

Filter Task Boards to view tasks related to a specific resource or Summary Task.



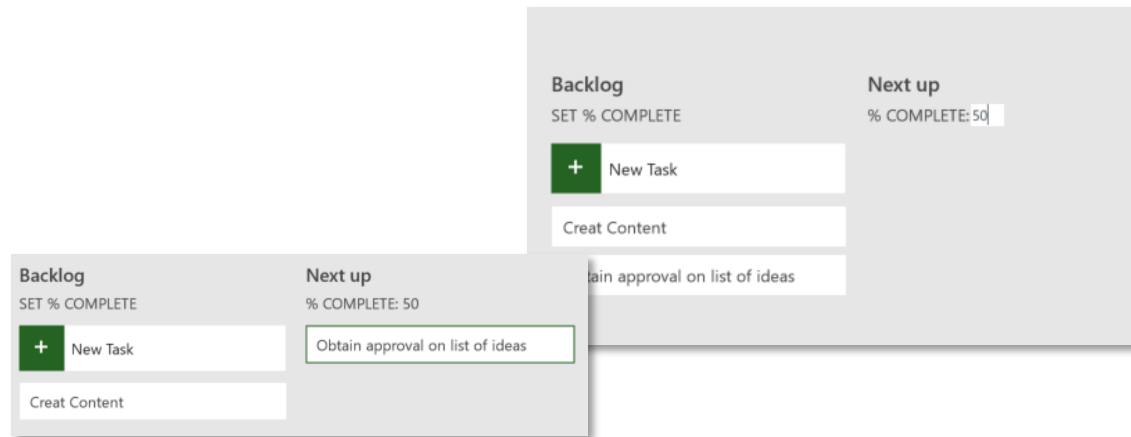
- Click on the filter icon to display filtering options
- Choose multiple **Summary Tasks** or **Resources**
- From the Format tab, select **Customize Cards** to add fields



Manage Sprints

To set % Complete from the task board:

- Click in **SET % Complete** and enter the percentage
- Move tasks in to that column
- The tasks % Complete will be updated



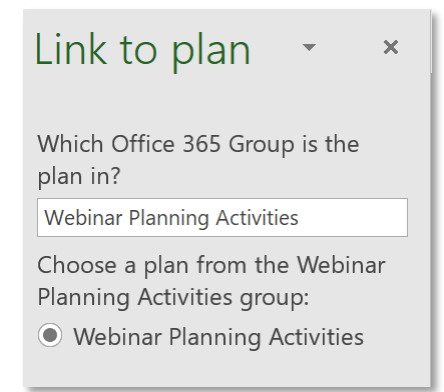
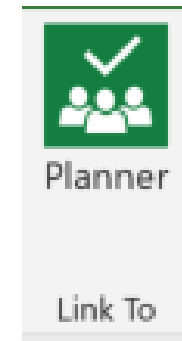
Link a Task to Planner

You can link a task in Project to a plan in Microsoft Planner.

To link your task to Planner:

- Select a task and click on the **Planner** button on the Task ribbon
- In the **Link task to a plan** pane, search for the group that your plan belongs to
- Choose the plan from the list and select **Create Link**

Note: The project and task must be published first




Predecessor Drop Down

- Select the drop-down in the **Predecessor** column
- Use the check boxes to create a **Finish to Start** dependency
- The hierarchy matches your project

Task Name	Duration	Start	Finish	Predecessors	Res
PMI Process	17 days?	6/2/16	6/24/16		
Read this note to understand the context and numbers (n.n.)	1 day?	6/2/16	6/2/16		
Process Groups and Knowledge Areas	1 day?	6/2/16	6/2/16		
Initiation Processes	5 days?				
Review Inputs to Initiation	4 days?				
Review Contract	1 day?				
Review Project Statement of Work	1 day?				
Review Enterprise Environmental Factors	1 day?				
Review Organizational Process Assets	1 day?				
Produce Outputs from Initiation	1 day?				
Develop Project Charter (3.2.1.1)	1 day?				
Develop Preliminary Project Scope Statement (3.2.1.2)	1 day?				



2 Process Groups and Knowledge Areas

- 3 Initiation Processes
 - 4 Review Inputs to Initiation
 - 5 Review Contract
 - 6 Review Project Statement of Work
 - 7 Review Enterprise Environmental Factors
 - 8 Review Organizational Process Assets
 - 9 Produce Outputs from Initiation
 - 10 Develop Project Charter (3.2.1.1)
 - 11 Develop Preliminary Project Scope Statement (3.2.1.2)
- 12 Initiation Processes COMPLETE
- 13 Planning Processes (3.2.2.1)
- 14 Scope Management Processes
 - 15 Perform Scope Planning (3.2.2.2)



What's New in Project

Your latest Office 365 features



Quick drop-down for setting predecessors

Use the Gantt chart drop-down to choose which predecessors or successors you want to link to a task.

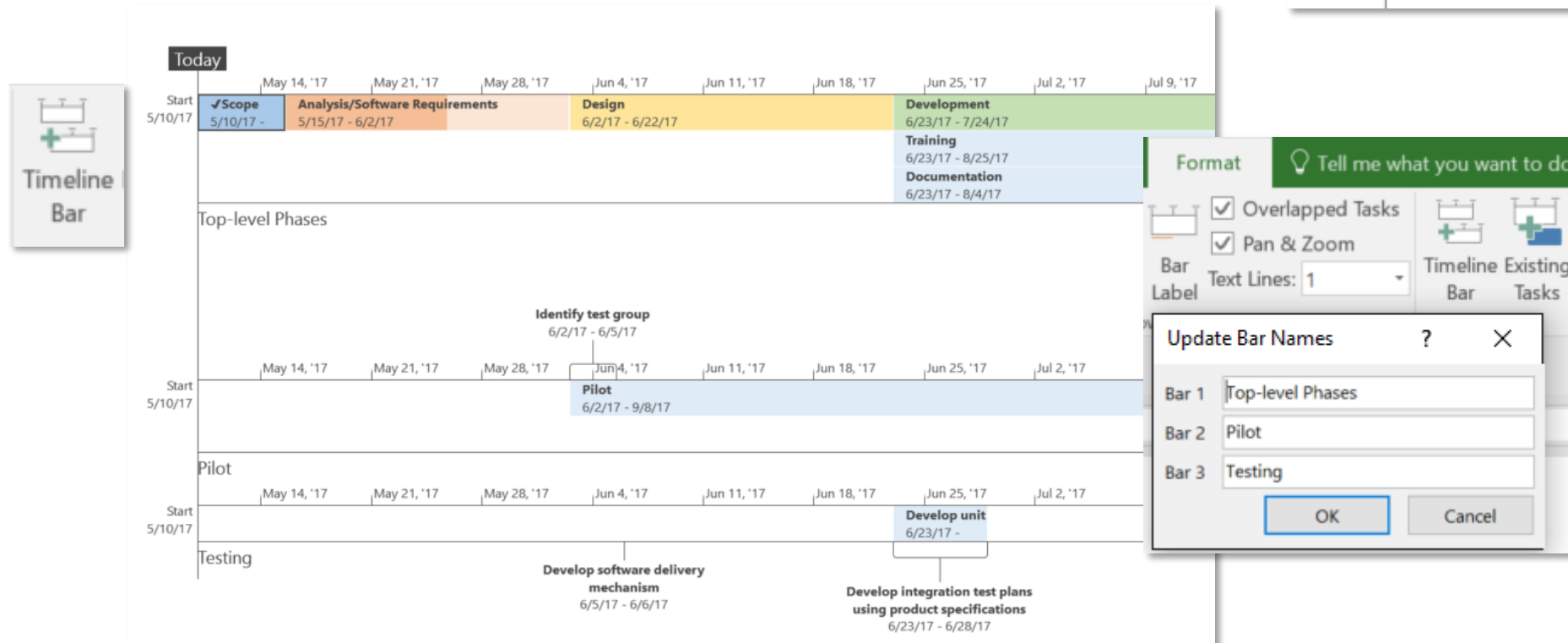
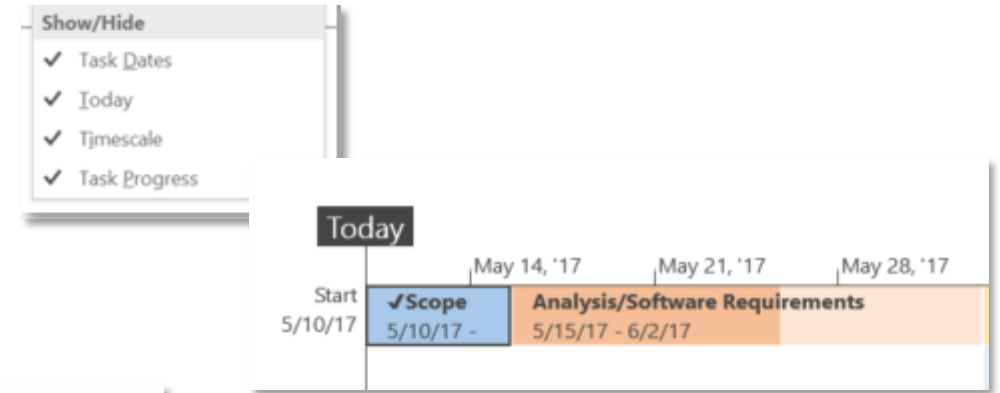
[Learn more](#)

Close

New Timeline Features

New Timeline formatting features:

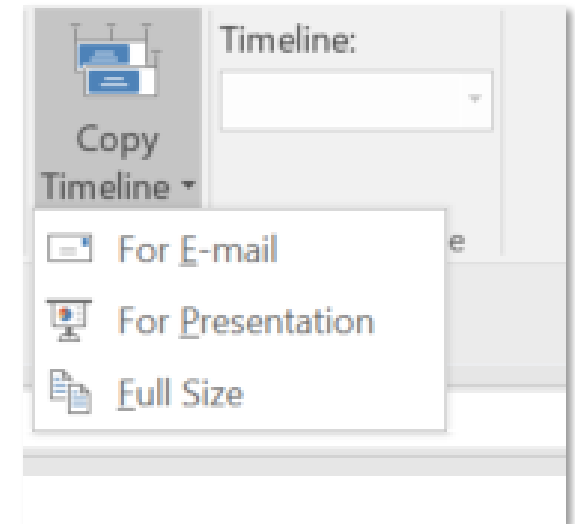
- Task progress is now displayed
- Additional Timeline bars can be added
- Labels for each Timeline bar can be created



Copy Timeline

To share the Timeline:

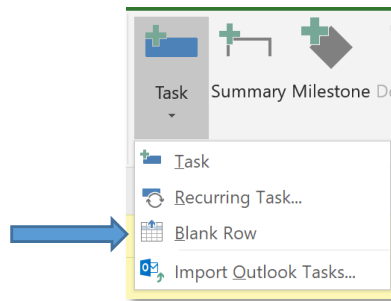
- Select Copy Timeline on the Format ribbon
 - For E-mail – copy the Timeline for an email message
 - For Presentation – will paste the Timeline in a PowerPoint or other application that supports graphics
 - Full Size – copy the Timeline at the current size
- Recipients do not need Project Professional to view the Timeline



Insert Blank Row

To insert a Blank Row instead of a New Task:

- Navigate to the **Task** ribbon
- Highlight the row where you want the task inserted above
- From the ribbon click on the Task drop down and select **Blank Row**
- A blank row without estimated Duration, % complete and Start and Finish dates will be inserted



Task Name	% Complete	Duration
Boston Soccer Stadium	0%	135d?
Requirements	0%	30d
Document Requirements	0%	20d
Review and Approve Requirements		
Requirements Complete		

Note: How it inserts a blank row without estimated Duration, % Complete and Start and Finish Dates

Task Summary Name

With long lists of tasks, it can be difficult to know what a task is indented under in the overall project plan. The **Task Summary Name** field is a read-only field that shows the name of a task's summary task. Right-click on the column title

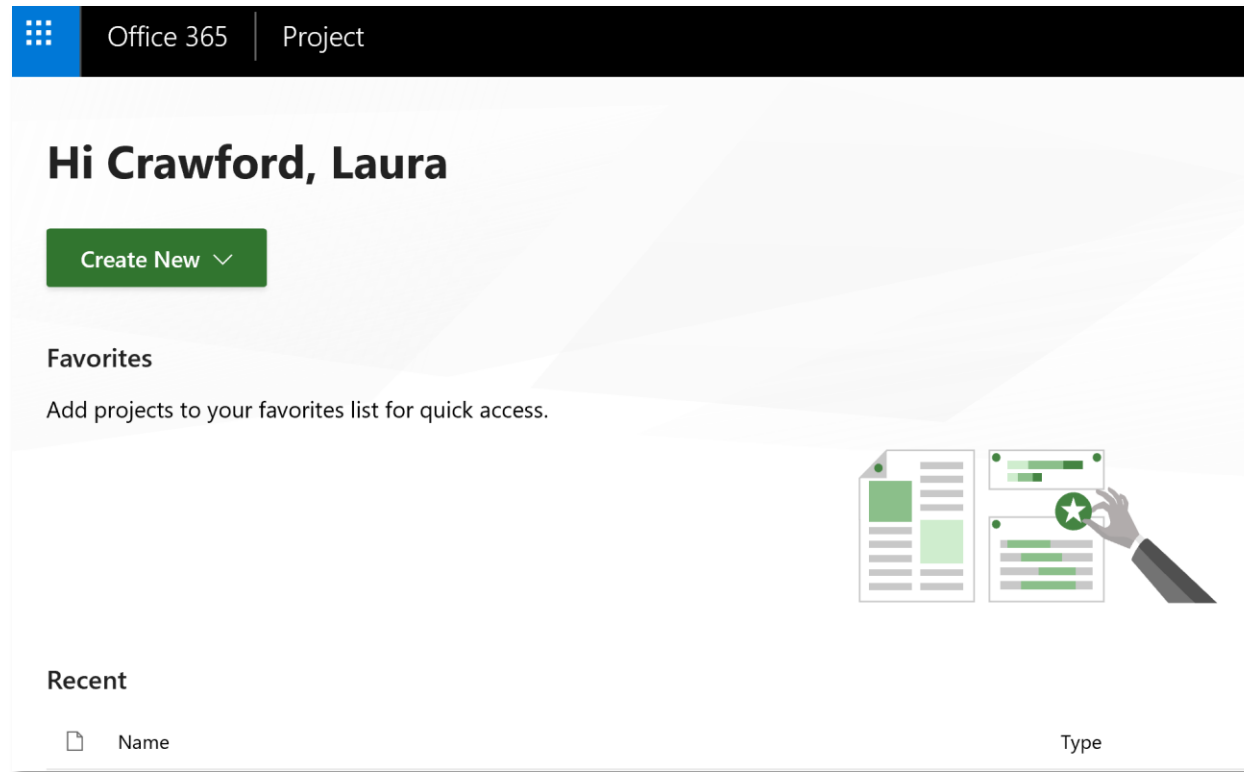
- Select **Insert Column**
- Select **Task Summary Name** from the drop-down list

Task Mode	Task Name	Task Summary Name
→	Commercial Construction	
→	General Conditions	
→	Receive notice to proceed and sign contract	General Conditions
→	Submit bond and insurance documents	General Conditions
→	Prepare and submit project schedule	General Conditions
→	Prepare and submit schedule of values	General Conditions
→	Obtain building permits	General Conditions
→	Submit preliminary shop drawings	General Conditions
→	Submit monthly requests for payment	General Conditions
→	Long Lead Procurement	
→	Submit shop drawings and order long lead items - steel	Long Lead Procurement
→	Submit shop drawings and order long lead	Long Lead Procurement

New Look and Feel

When logging in through the portal users will see a new interface.

- Scroll down to navigate to PWA



[Go to Project Web App →](#)

Modern Pages

Project Sites default to Modern Pages.

- Click on **Return to classic SharePoint** to change the style
- Click **Exit classic experience** to return to Modern Pages

The screenshot displays a SharePoint Modern Page interface. On the left, a navigation pane shows the site structure: Home, Notebook, Documents, Tasks, Calendar, and Projects. The main content area is titled 'Commercial Construction' and shows a list of 'Issues'. A green button labeled 'Return to classic SharePoint' is overlaid on the bottom left of the page.

On the right, a detailed view of the 'Issues' list is shown. The top navigation bar includes 'BROWSE', 'ITEMS', and 'LIST' tabs. The 'ITEMS' tab is active, showing a list of items. A green button labeled 'Exit classic experience' is overlaid on the bottom right of the page.

The 'Issues' list table is as follows:

Attachments	ID	Title
	1	Title Test

The 'Exit classic experience' button is located at the bottom right of the page, near the 'Project Details' link.



Microsoft PPM

Demo



LinkedIn: <https://www.linkedin.com/in/lauracrawfordmct/>
and
<https://www.linkedin.com/company/ppm-works-inc->

Our Site: www.ppmworks.com

Blog: <http://blogs.ppmworks.com>

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts @ <https://ppmworks.com/blog/> for additional information on the topics we covered
3. Get LinkedIn with me Laura Crawford
4. Get LinkedIn with PPM Works
5. Send questions to Info@ppmworks.com
6. Become an Office Insider
<https://products.office.com/en-US/office-insider>

Contact Us

**We'd Love to Hear From You-
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