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
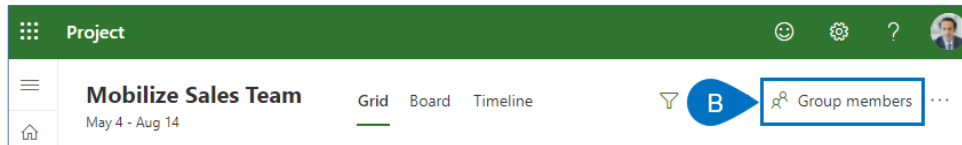4. Estimate the work
5. Establish dependencies

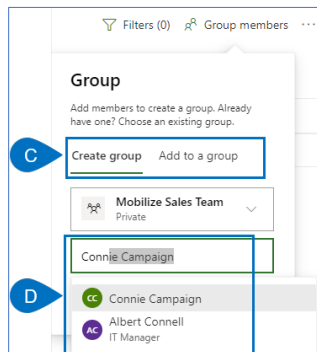# Build the team

👤 **Project Manager**　　　　　　　　　　　　🔧 **Project for the web**

1. **ASSIGN TEAM MEMBERS TO MICROSOFT 365 GROUP**
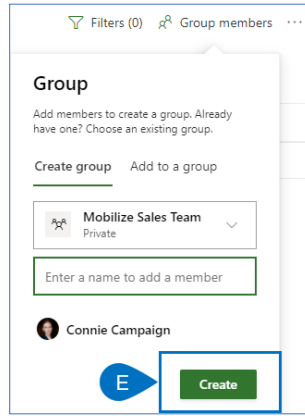
   a. Open the project schedule in **Project for the web**.
   b. Click **Group Members** from the top right corner.

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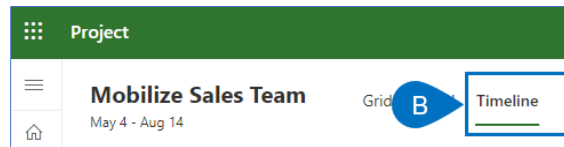   d. Search for and select the **team members** and **stakeholders**.

   e. Click **Create** to create team as a Microsoft 365 group.
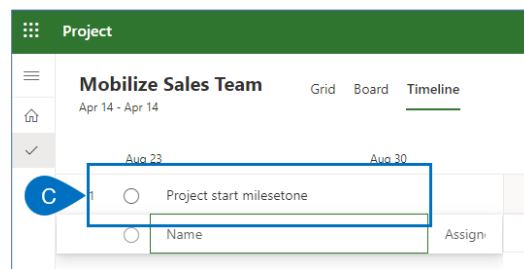
Identify the work using the Timeline view

👤 **Project Manager**   🔧 **Project for the web**
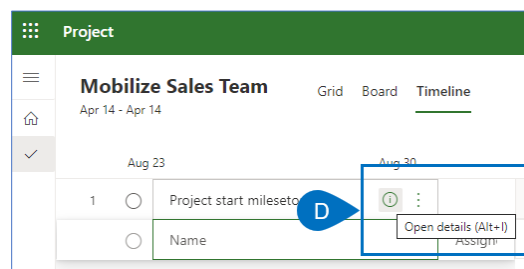
1. CAPTURE PROJECT DELIVERABLES

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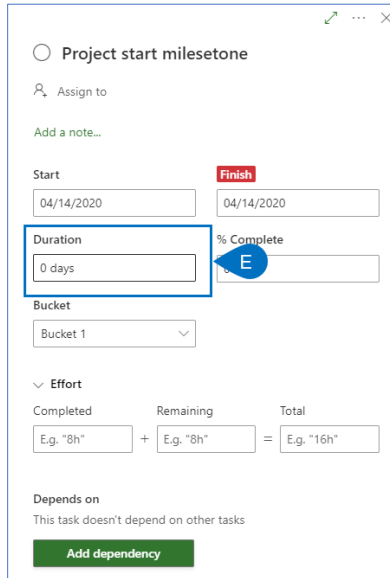
b. Click **Timeline** from the ribbon.

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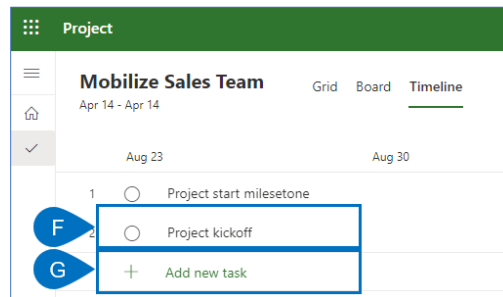

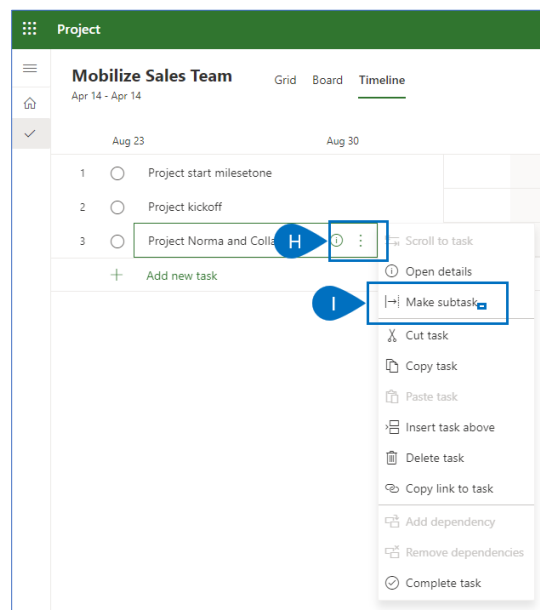d. Hover your mouse over the milestone name to activate the **i Icon** and click on it to open the task pane.

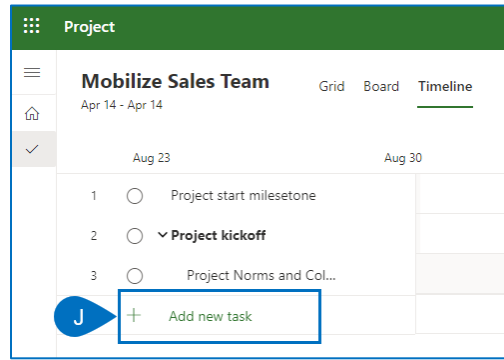e. Set the **Duration to zero** to make it a Milestone.

| P a g e 2 o f 17

f. **Define the first phase of the project** by typing the phase name in the 'Add new task' area.

g. Continue to add the first **deliverables** in the same way.

h. Hover your mouse over the deliverable name to activate the **ellipsis** and click on them to open the **task sub-menu**

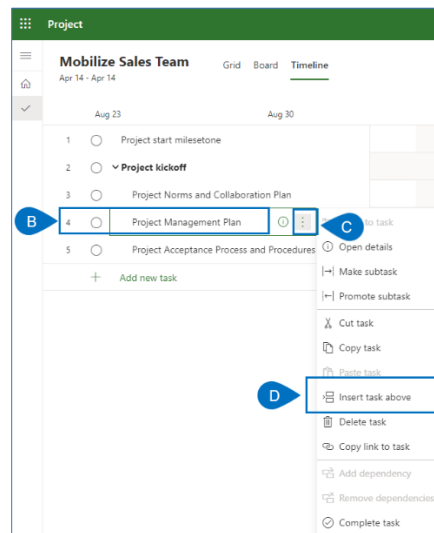i. Click **Indent task** to make it a "child" of the Phase.

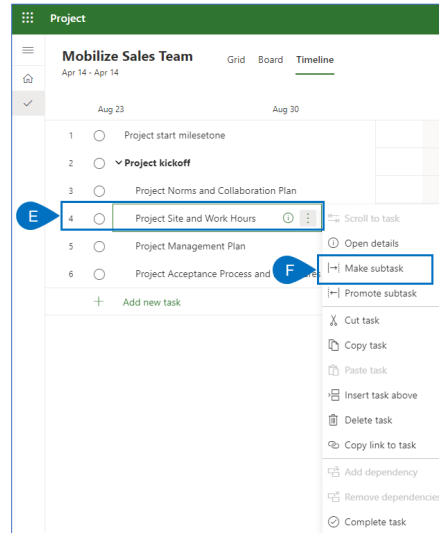j. Continue to add Milestones, Phases and Deliverables in the same way.

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.
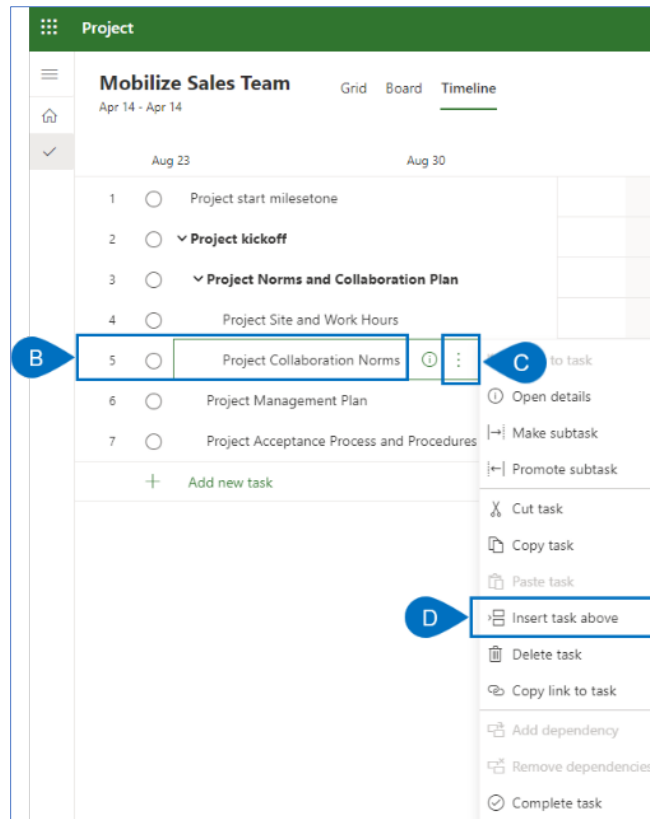

e. Hover your mouse over the new sub-deliverable and select the **ellipsis** to open the **task sub-menu**.

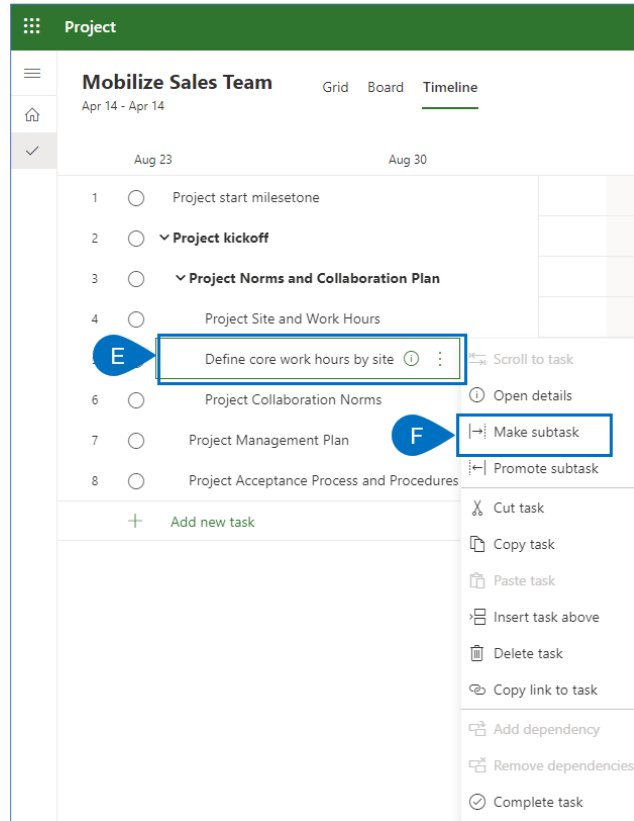f. Click **Make subtask** to make it a sub-deliverable.

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.

e. Enter the new task and then hover your mouse over the new task and select the **ellipsis** to open **the task sub-menu**.
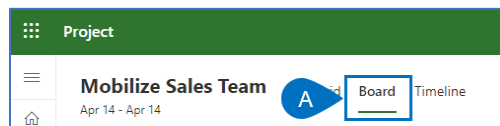
f. Click **Make subtask** to make it a sub-deliverable.
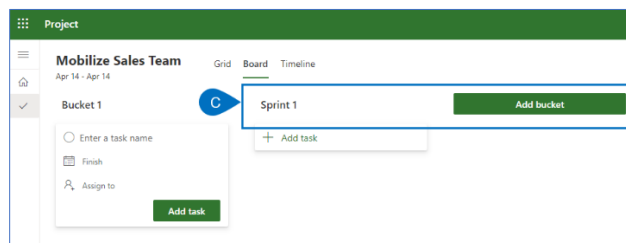
g. Continue to decompose the WBS as required.

Identify the work using the Board view

Project Manager   Project for the web

1. CONFIGURE THE BOARD

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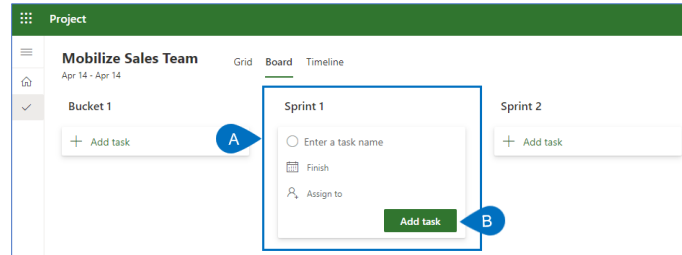
b. Click **Board** from the ribbon.

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.

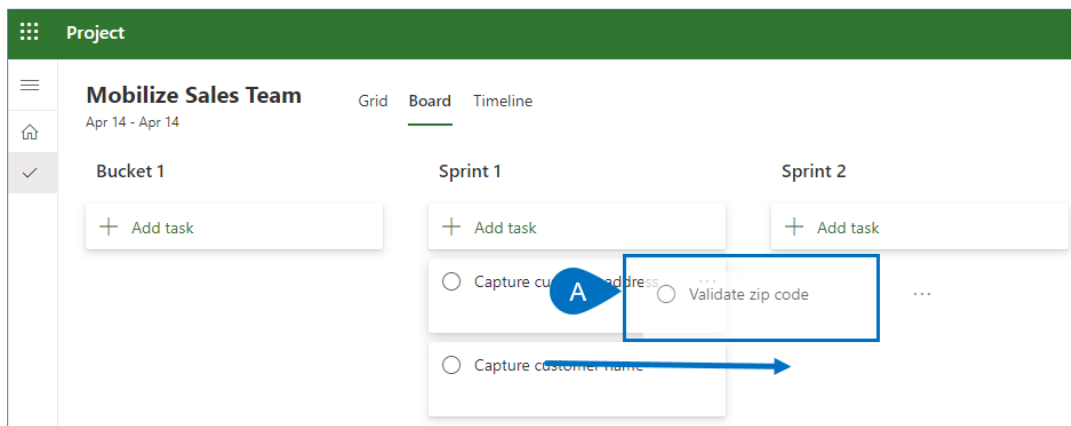d. Continue to add buckets until the board is fully defined.

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**.

c. Continue to add stories to the project in the same way.
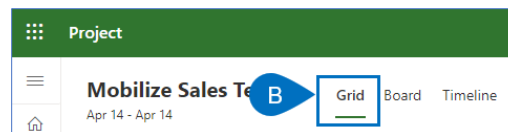
3. ORGANIZE THE BOARD

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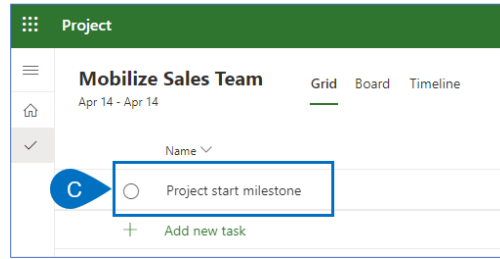

Identify the work using the Grid view

Project Manager   Project for the web
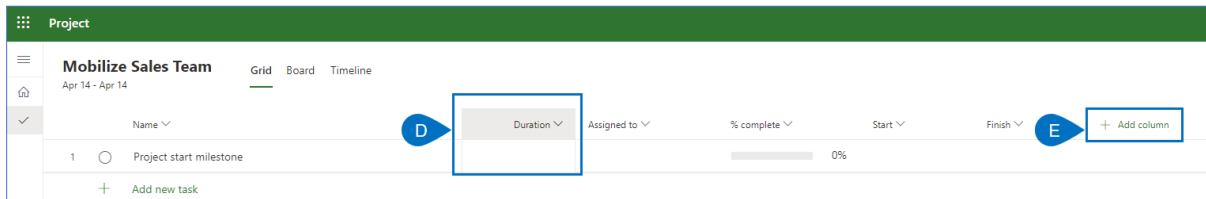
1. CAPTURE PROJECT DELIVERABLES

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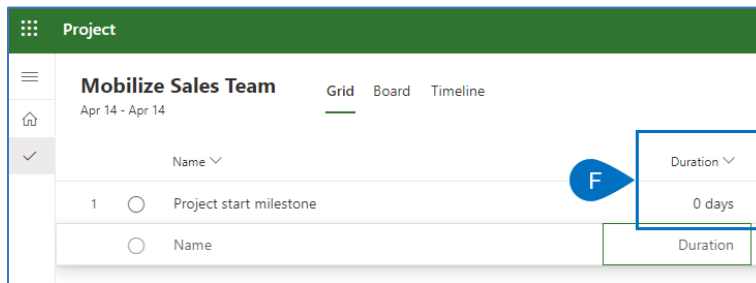
b. Click **Grid** from the ribbon.

c. Create a **project start milestone** as the first line in the new schedule. Replace "Add new task' with a project start milestone.
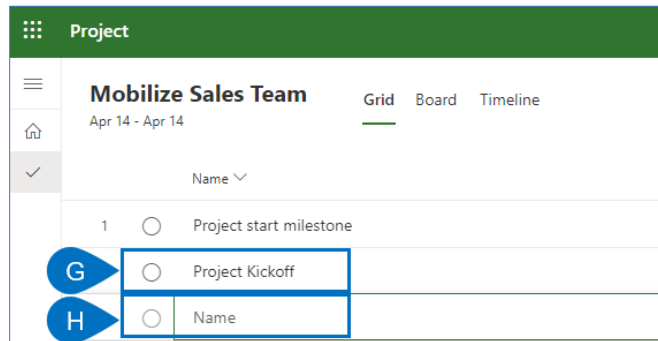
d. Ensure that the **Duration column** is visible.
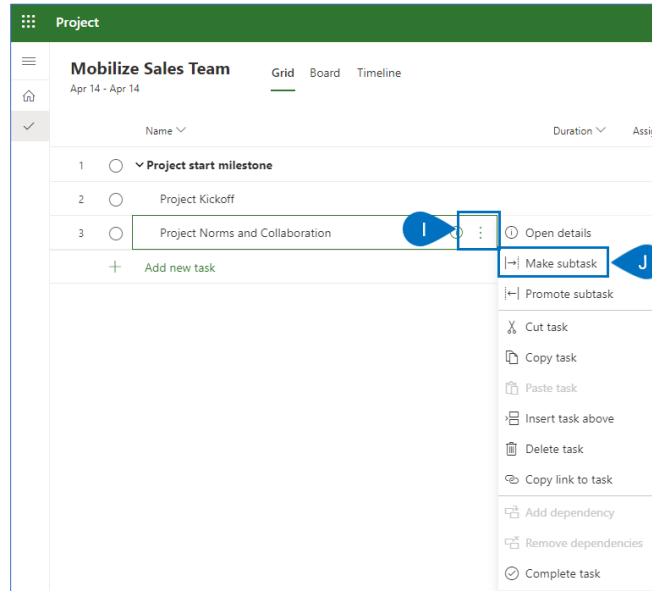e. Select **Add column** to add it is necessary.
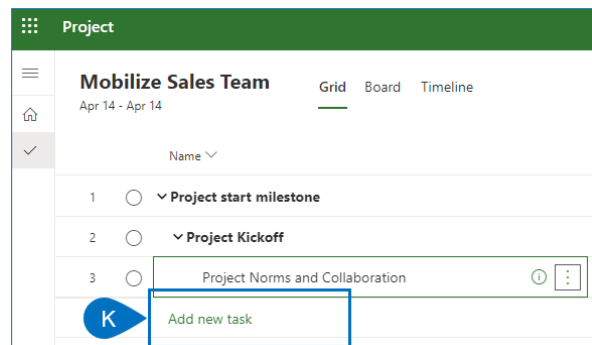

f. Set the Duration to zero to make it a Milestone.

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.**
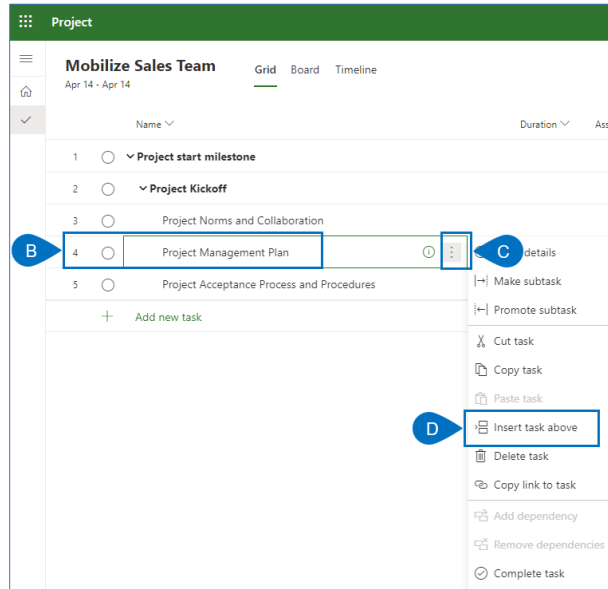j. Click **Indent** task to make it a "child" of the Phase.

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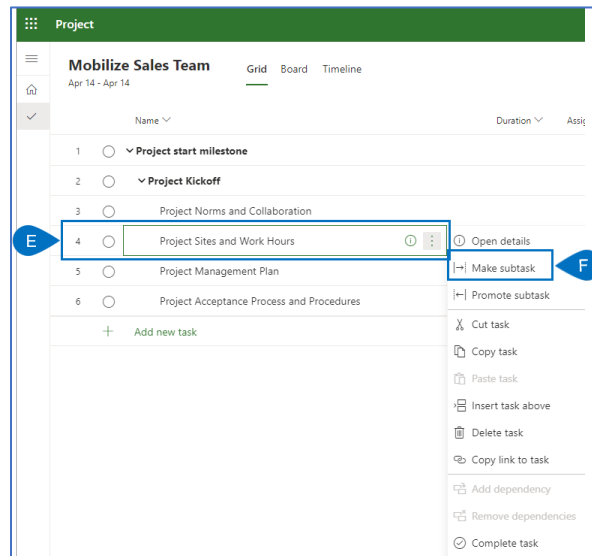

2. CAPTURE PROJECT SUB-DELIVERABLES

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 on 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.**

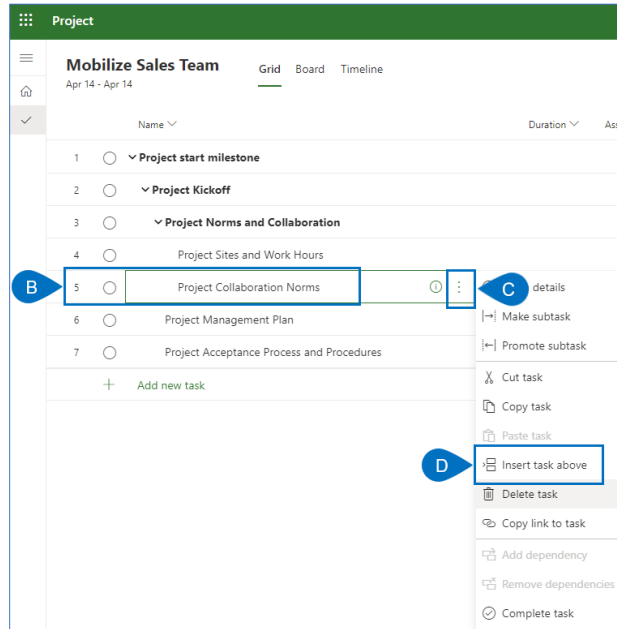d.   Click **Insert t**ask above to add the sub-deliverable.

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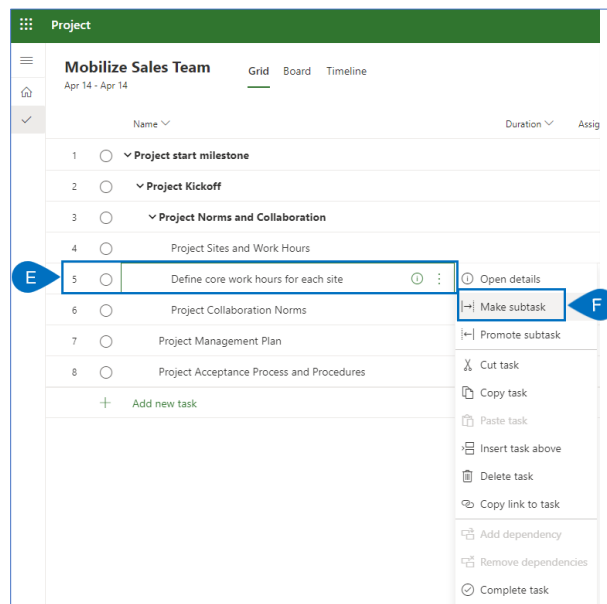f. Click **Make subtask** to make it a sub-deliverable.

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.

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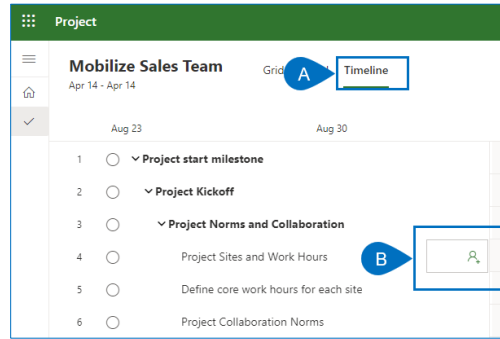f. Click **Make subtask** to make it a sub-deliverable.

g. Continue to decompose the WBS as required.

Assign Resources

👤 **Project Manager**   🔧 **Project for the web**
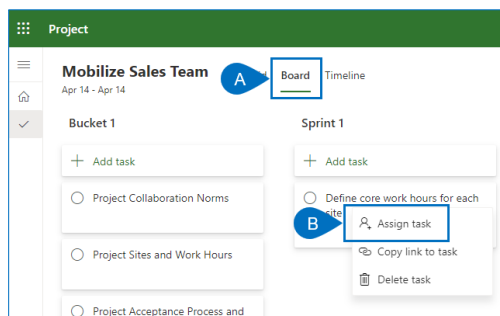
1. ASSIGN RESOURCES IN THE TIMELINE VIEW

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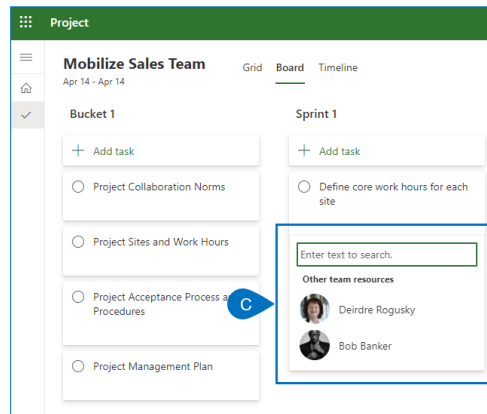
c. Search for and **add the team member(s)** to the task.

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**.
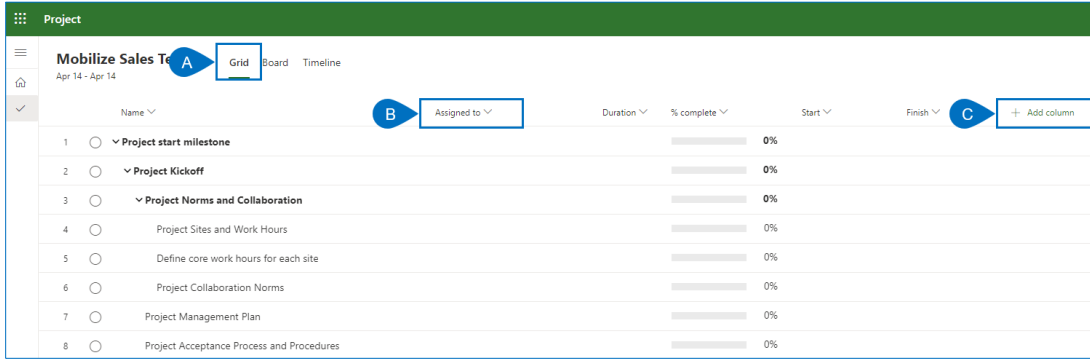

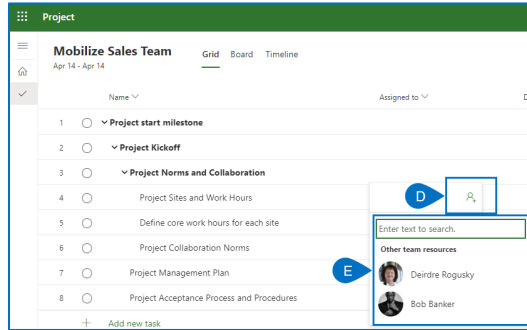c. Search for and add the **team member(s)** to the task.

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.

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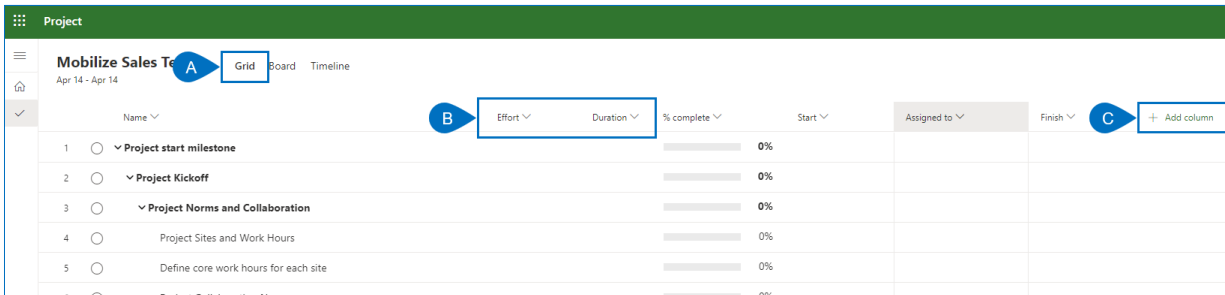e. Search for and add the **team member(s)** to the task.

Estimate the work

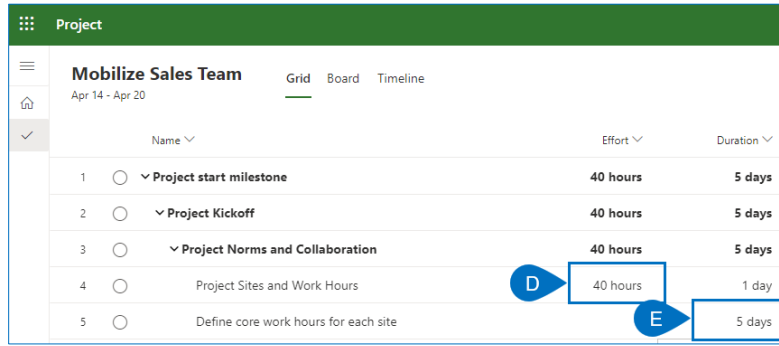👤 **Project Manager**   🔧 **Project for the web**

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.
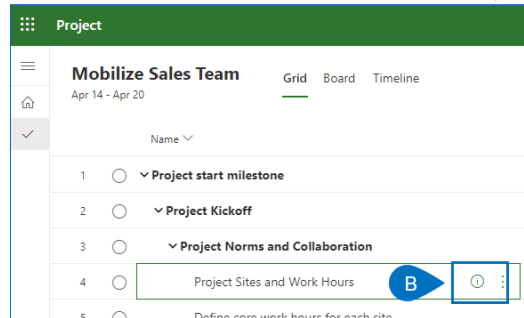c. Click **Add column** to add one or both columns as needed.

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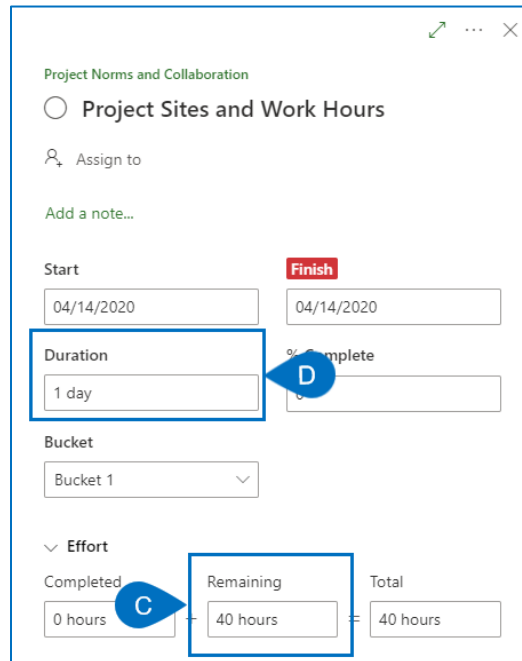e. **In the Duration column** based on estimating how long the task will take.

2. ESTIMATING THE WORK IN THE TASK PANE

a. Ensure you have the appropriate project open in **Project for the web.**

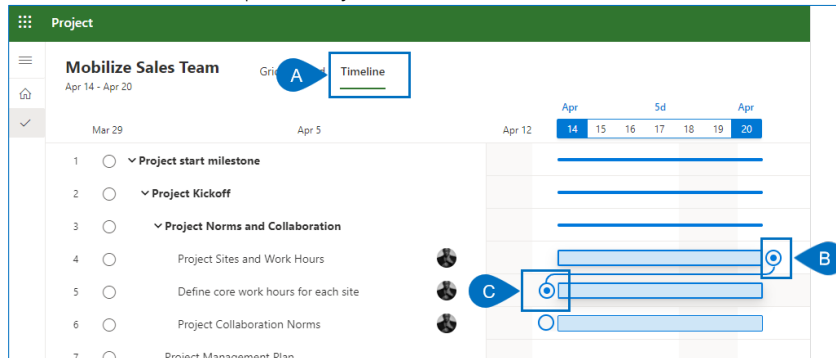b. In any view, hover your mouse over a task to activate the i icon and select it to open the task pane.

c. Enter the task estimate in the **Effort remaining box** based on estimating the amount of work required to complete the task or

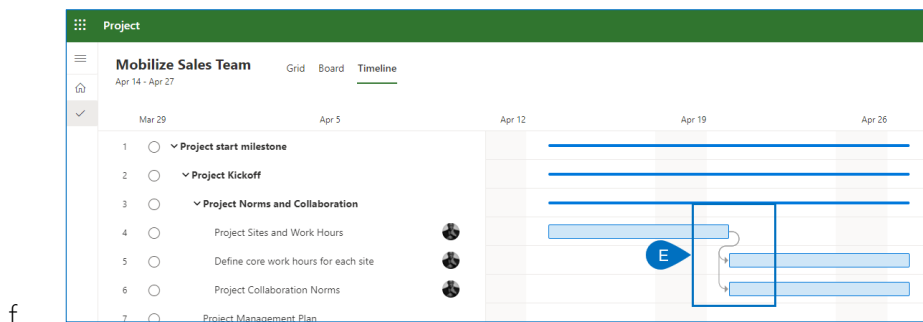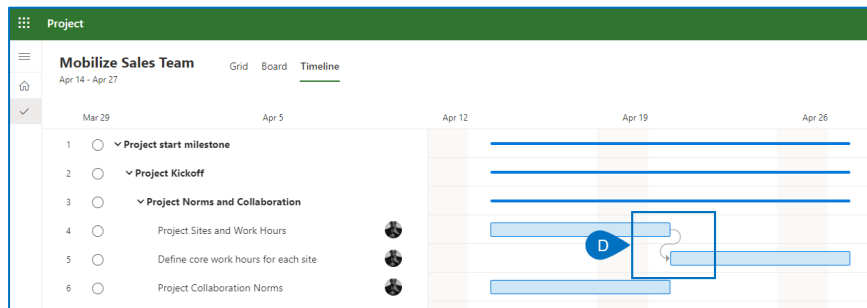d. **In the Duration** box based on estimating how long the task will take.

Establish dependencies

👤 Project Manager   🔧 Project for the web

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

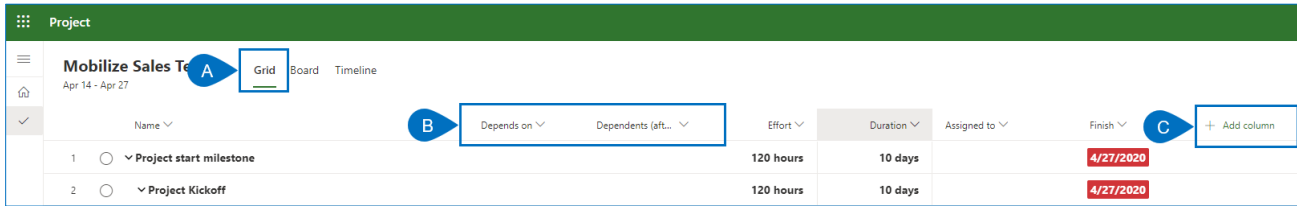   c. And release the mouse to create the dependency.

   d. Create additional dependencies in the same way.

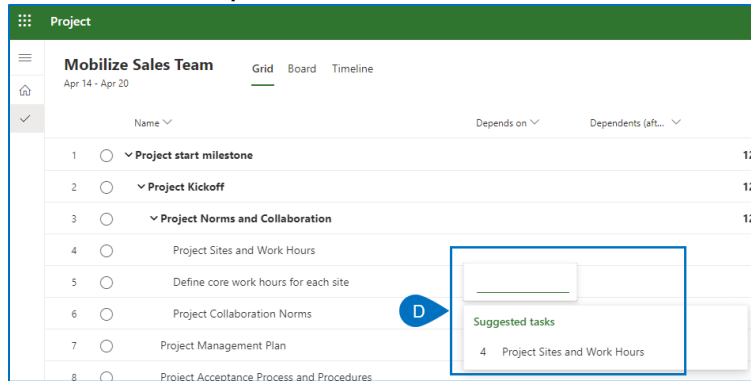   e. A single task can have many predecessors and successors

   .

   f. .

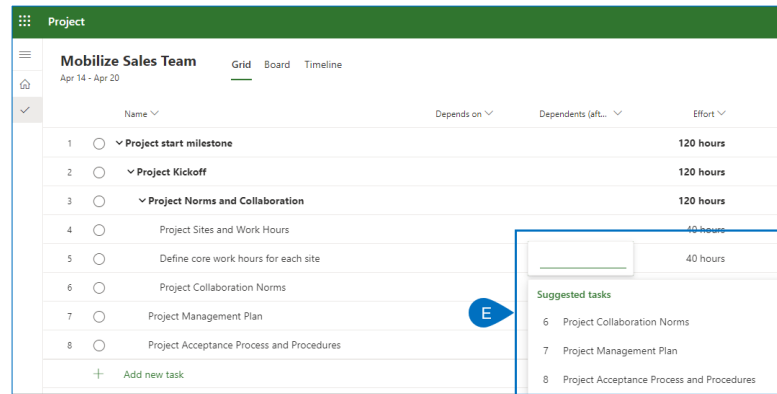2. **CREATNG DEPENDENCIES IN THE GRID VIEW**

   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

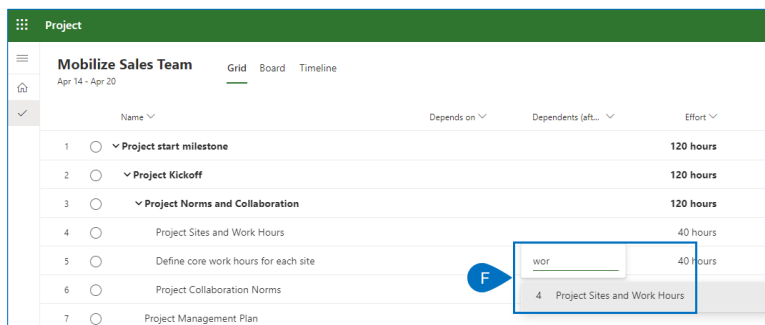   c. Click in **Add column** to add one or both as needed,

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

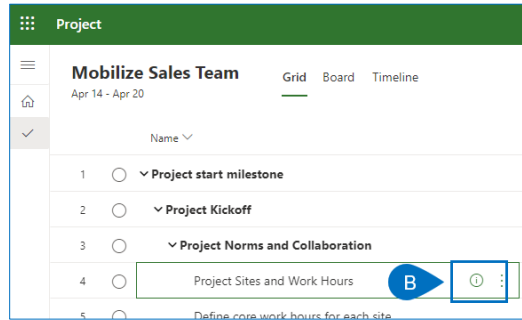e. The **Dependents** column to add a **successor** task.

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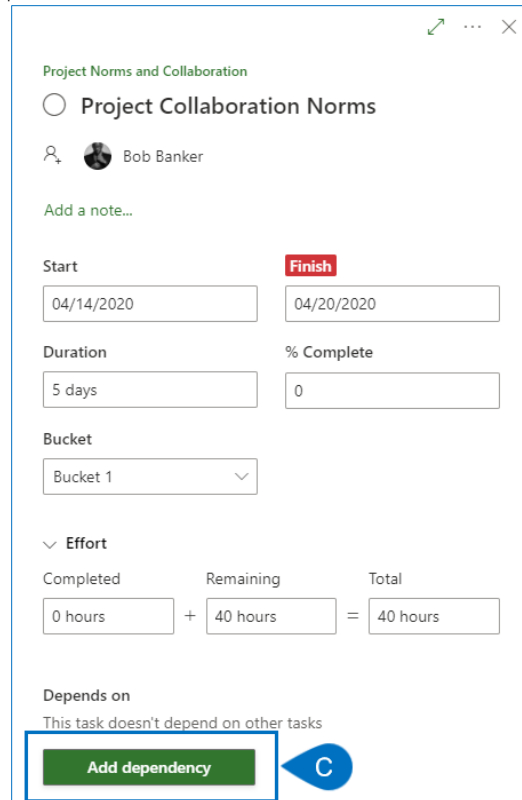

3. CREATNG DEPENDENCIES IN THE TASK PANE

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.

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

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