

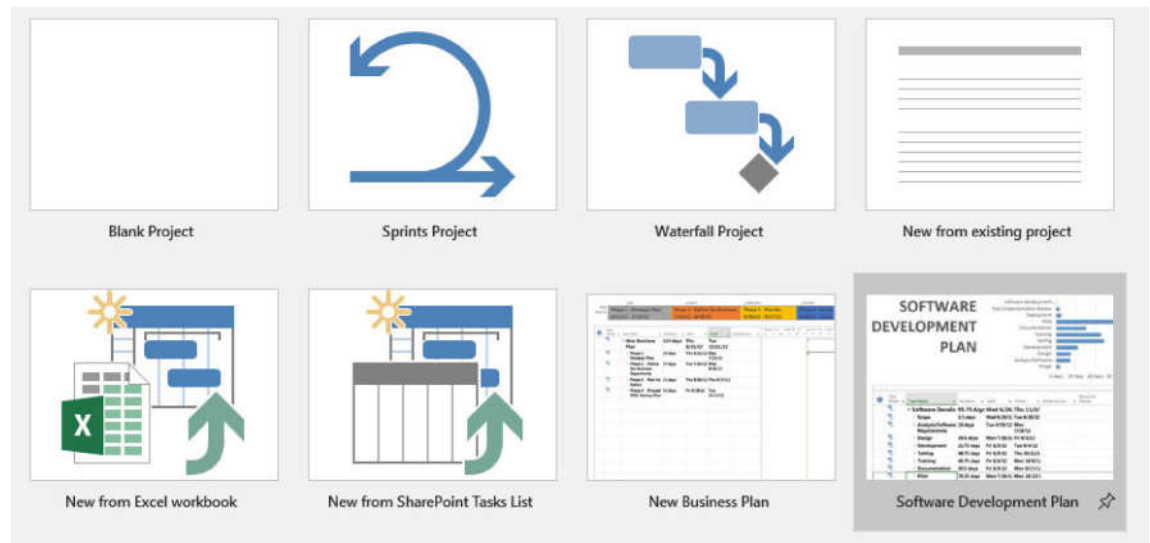
# TOPIC A

## Create a New Project Plan File

Now that you're familiar with common project management concepts, and know your way around the Microsoft Project interface, you're ready to start managing a project. In order to take full advantage of the robust capabilities of Project, it stands to reason that you must first create a project plan in the application. In this topic, you'll do just that.

### Methods for Creating New Projects

Defining a new project begins with creating a new project plan file. You can begin with a blank file or start with a template that is already populated with project phases and tasks for common project types. When you first open the application, Project displays the **Start** screen, which gives you several methods for creating new files.



**Figure 2–1:** You can choose from several methods for creating new projects.

The following table describes the different methods for creating new project plan files.

<b>Method</b>	<b>This Method</b>
Blank Project	Gives you a completely empty file into which you can add all of your project information.
New from an existing project	Enables you to reuse a Project file from a previous project.
New from Excel® workbook	Imports project information created in Excel. When you choose this option, a wizard will open and guide you through the steps of importing the project information from Excel to Project.
New from SharePoint® tasks	Enables you to import project information from a SharePoint task list. When you choose this option, you will be prompted to enter a SharePoint URL and select a task list on the SharePoint site.

Method	This Method
From a Project template	Enables you to create a Project file that is customized for a variety of different project types. When you choose this option, a Project file containing sample information will be created. You can then modify the information for your particular project.

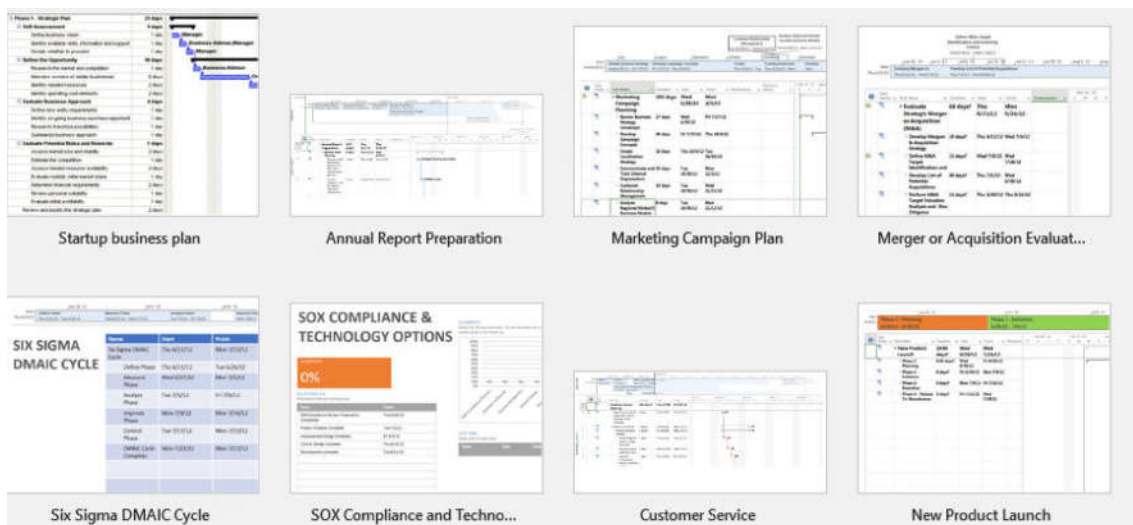


**Note:** Microsoft SharePoint is a web-based application that enables geographically distributed teams to store, sync, and share their important content. Visit <http://sharepoint.microsoft.com/> to learn more about SharePoint.

## Project Templates

A *project template* contains details for a sample project that you can edit to make your own or simply use to help frame your own project phases.

Microsoft Project comes preloaded with 27 templates that are geared toward a variety of different project types. Using a template can save you time because you do not have to create the project structure from scratch. However, you will still need to modify the template with the details of your particular project. If you do not see a template on the **Start** screen that is similar to your project, you can search online for one that is.



**Figure 2-2:** Project templates help you create new project plans with much of the information and formatting in place.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Create a New Project Plan File.

# ACTIVITY 2–1

## Creating a Project Plan File from a Template

### Before You Begin

Microsoft Project is installed on your computer.


### Scenario

Greene City National Bank is a mid-sized financial institution with 26 branches in Greene City and surrounding towns. Senior management has been exploring expansion opportunities, and has decided to purchase another financial institution elsewhere in the state. This would be accomplished through either a merger or an acquisition, with the choice depending on the target institution.

You are a project manager in the bank's Project Management Office (PMO), and have been selected to manage this exciting project. You are not familiar with the entire Merger and Acquisition (M&A) process, and have researched project plans that can be adapted for your use. Microsoft has what appears to be a very complete template, and the director of the PMO has agreed to use it.

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### 1. Open Microsoft Project 2019.

- a) On the taskbar, select the **Project 2019** shortcut. 
- b) Verify that Microsoft Project opens.

### 2. Download the **Merger or Acquisition Evaluation** template.

- a) In **Backstage View**, select **Search for online templates**.
- b) Type the search term *merger or acquisition* and select the **Start searching** button.
- c) From the search results, select **Merger or Acquisition Evaluation**.
- d) In the **Start Date** field, type *April 6, 2020*
- e) Select **Create**.  
Verify that the template opens in Project.

### 3. Save your changes as *My MA.mpp* and close the file.

- a) On the ribbon, select **File→Save As**.
  - b) Select **Browse** and then navigate to **C:\091098Data\Defining a Project\**.
  - c) In the **File name** field, enter *My MA* and then select **Save**.
  - d) On the ribbon, select **File→Close**.
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# ACTIVITY 2-2

## Creating a New Project Plan File from Scratch

### Before You Begin

Microsoft Project is open.

### Scenario

The Human Resources Department of Greene City National Bank has purchased new software that will be used to track the hiring and training of all bank employees. The PMO has been asked to develop a training manual that HR staff will use to administer the software, and you have been assigned as the project manager for this effort.

One of your first duties is to prepare a project plan in Microsoft Project. This plan will contain tasks, resources (people) to work on them, and schedules of when the tasks should start and finish. You decide to prepare the plan from scratch, as it will not be overly complex.

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#### 1. Create a new blank project plan.

- a) In **Backstage View**, select **Blank Project**.  
Verify that a blank **Gantt Chart** is displayed.

#### 2. Save your changes as *My HR Manual.mpp*.

- a) On the ribbon, select **File→Save As**.
  - b) Select **Browse** and then navigate to **C:\091098Data\Defining a Project\**.
  - c) In the **File name** field, enter *My HR Manual* and then select **Save**. Leave the file open.
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