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# 1

## The Basics

*This chapter introduces  
Microsoft Project 2013 and  
explains how it can help you  
manage your projects.*

- 8** Introduction
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**Hot tip**

The illustrations in this book are from Project 2013. Project 2010 is very similar but earlier versions can look very different. You'll find **Project 2010 in easy steps** more helpful if you have Project 2010.

# Introduction

Microsoft Project 2013 is the latest release of this popular project management tool. Managing projects can be a complex activity but, with the help of Project, you can plan, schedule, track and communicate on the progress of your project. Whether it is a simple, short-term project (like arranging a company event) or a more complex project (such as launching a new business), Project can help you stay in control of it.

This book covers both the Standard and Professional versions of Project. The main difference between them is that Project Professional allows you to collaborate and share information with other Project users in your organization. The detailed differences are noted throughout the book and summarized under Version Comparison (page 12).

## Project Features

Project can produce some great-looking charts and diagrams to help you plan your project, but it can do a lot more besides:

- It can help you to understand, develop and manage project plans and schedules
- It can produce a critical path analysis to identify the areas where you will need to keep a close track on progress
- It can identify if you have too much work allocated to any one person
- It can schedule facilities, such as meeting rooms and equipment for you
- It can help you to understand and control project budgets and costs
- It can keep track of public holidays and team members' vacations and other commitments
- It can help you build professional-looking reports to communicate and present project information in an effective and understandable way



The New icon pictured above indicates a new or enhanced feature introduced with the latest version of Project.

## Project Enhancements

Project 2013 has introduced a number of new and enhanced features. These are indicated wherever they occur throughout the book. They are also summarized under What's New (page 10).

# Project Management

Successful project management is about completing a project on time, within budget, and with the needs of the business fully met. While this is easy to say, a large percentage of projects fail. The most commonly quoted figure is around half of all projects, although, depending on how you define failure, it could be as little as 25% (total failure) or as much as 75% (failed or seriously challenged).



Whichever way you look at it, only around one quarter of projects end up as fully successful (i.e. completed on time, within budget, and with the required scope). In order to get most projects completed, corners have to be cut, but things still seem to take longer than expected. As a further result, costs inevitably seem to increase.

## Successful Projects

It doesn't have to be that way. We know how to ensure projects are successful – it's not rocket science; it's just plain common sense. Throughout this book, you will find some basic project management concepts that have been proved in practice. Follow these concepts and advice to ensure that your project will be successful.

## Microsoft Project

Microsoft Project is a great product that will help you plan, organize and control your project. It won't carry it out for you (you still have to do that yourself), but what it will do is help you to control and complete it successfully.

Hot tip



**Effective Project Management in easy steps** is a companion book and covers project management in more detail.

# What's New?

With each new release of Project, Microsoft typically addresses some issues and introduce a number of enhancements. With the previous release (Project 2010), Microsoft introduced some significant changes. These included the fluent user interface (ribbon) in place of the traditional toolbars and buttons, enhanced table features (similar to Excel), user-controlled scheduling and a new timeline view.

While the changes in this release of Project 2013 are not quite so radical they do represent some enhancements and new features. These are noted, where relevant, throughout the book. But in summary the key new features and functionality are:



## Updated Visuals

Along with the rest of the Microsoft Office suite of programs, Project 2013 has a new cleaner look that is designed to be simpler to understand and easier to use.



## OfficeArt for Project Reports

Project 2013 now supports OfficeArt in reports. It allows you to create pictures, tables, charts, shapes and text boxes (objects) in Project reports. It also allows you to re-position, edit or remove any existing objects. This works in the same way as in Microsoft Word, Excel, PowerPoint and Outlook and consequently you can now share OfficeArt content between all these programs.



## Improved Reports

With Project 2013, Microsoft has delivered a new set of report templates which use the OfficeArt infrastructure. These allow you to create dynamic reports in Project without the need to export data to another program. The feature to create data cubes for automatic export to Pivot Tables in Excel and Pivot Diagrams in Visio Professional has also been retained.



## Burndown Reports

Project 2013 now supports the production of burndown charts (called burndown reports by Microsoft) which are a key requirement in agile project management methodologies. These can show planned work, completed work and remaining work as lines on a graph.

## Burndown Data

In order to support the production of these new burndown

## ...cont'd

reports, Project 2013 now includes eight new fields to hold the required data:

- Cumulative work baseline (0 to 10)
- Remaining cumulative work baseline (0 to 10)
- Remaining tasks baseline (0 to 10)
- Cumulative actual work
- Remaining actual tasks
- Remaining cumulative actual work
- Remaining cumulative work
- Remaining tasks

### Task Paths

This new feature allows you to highlight the entire link chain for any specific task. The link chain is the sequence of tasks that directly affect or are affected by the selected task. You can also choose to highlight predecessor or driving predecessor (critical path) tasks and successor or driven successor (critical path) tasks.



### Extended Date Range

Previously, Project supported dates up to the year 2049 but with Project 2013, task and project dates are now supported up to the year 2149.



### Backstage Overhaul

Microsoft now refers to what was the File menu as the Backstage view, and with Project 2013 the File menu has been revised to provide some improvements in the following areas:

- Microsoft has tried to make it somewhat simpler so that it is easier to find what you are looking for
- Project 2013 has also now been brought into line with the other Microsoft Office programs
- The File menu now provides one single location where you can open and save files in a number of different formats to your own computer or network, the World Wide Web, a Project Server or a SharePoint site



# Version Comparison

There are two versions of Project 2013: Project Standard and Project Professional, together with three companion products (SharePoint Server, Project Server and Project Online).

## Project Standard

Microsoft Project Standard 2013 is designed as a stand alone project planning and scheduling tool for people who do not need to collaborate and share data with other project managers.

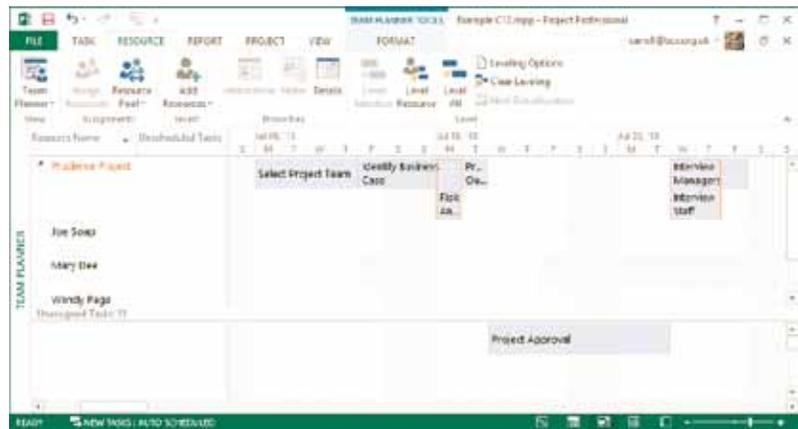
It is offered at a reduced cost as it does not contain all of the functionality in Project Professional. As this book covers both versions, any functions that are not available in Project Standard are highlighted with warnings throughout the book.

## Project Professional

Project Professional 2013 is designed to work in an environment where project managers need to share and pool information. It therefore contains some additional functionality to assist with these tasks. These are covered in detail in the book, but in summary, the two main additional features are:

### Team Planner

This feature provides visual dragging and dropping of assignment changes as illustrated below:

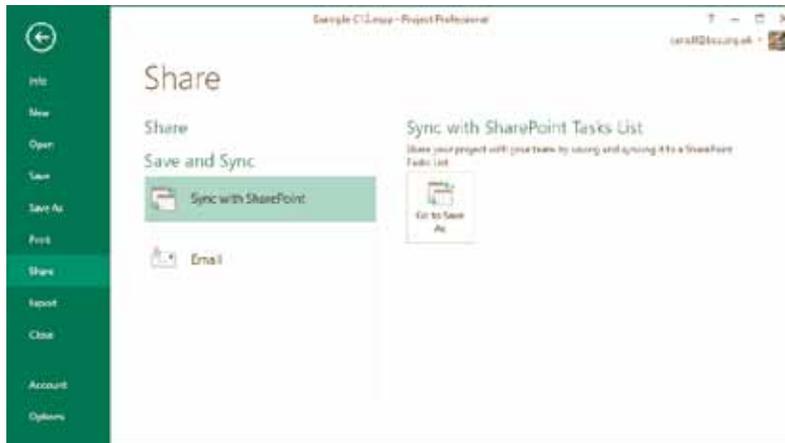


The top part of the screen displays the allocated tasks, with over-allocations highlighted in red. The lower part shows unallocated tasks. Tasks can be dragged and dropped between resources and between allocated and unallocated tasks.

...cont'd

## Enhanced Collaboration

Integration allows project schedules to be published and shared, with SharePoint. Synchronization of schedules between Project Professional and SharePoint task lists can also be performed, so that any changes made by team members in SharePoint can be reflected back into the Project schedule.



There are three main companion products available to Project Professional users:

### SharePoint Server

As illustrated above, Project Professional can publish schedules to and synchronize them with SharePoint Server. SharePoint provides a simple method of organizing, synchronizing and sharing project information on smaller projects.

### Project Server

Project Server provides a project portfolio management repository for all project data. It enables organizations to initiate, select, plan, and deliver projects while tracking time and budget. It also provides extensive reporting and mobile access to project data.

### Project Online

Project Online (which is part of the Microsoft Office 365 product range), allows an organization to make Project Professional available from the Cloud. This allows project managers to access the latest version of Project from any PC anywhere. It also stores their settings and files so they are all available from any location.

# The Gantt Chart

The first thing you see when you open or create a new project is the Gantt chart. It is the default view, and with good reason. The Gantt chart is probably the most widely used and most useful project management tool.

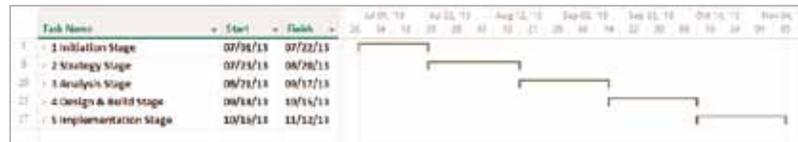
## Summary Level

They say that every picture tells a thousand words, and this is the key picture in your project:

Don't forget



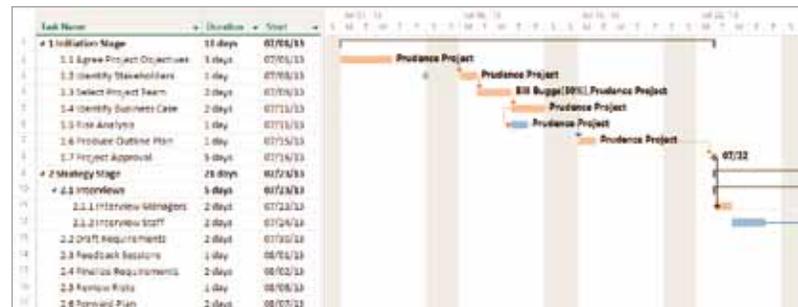
Please note that the dates illustrated in this book are in MM/DD/YY format.



At the summary-level (as illustrated above), you can view the whole project on one screen or sheet of paper. The Gantt chart represents the most frequently-used way of representing a project graphically and is particularly useful for senior management in its rolled-up summary form (as above).

## Detailed Level

At the more detailed level (as illustrated below), the Gantt chart is typically used by the project manager to communicate with the project team, and to track project progress, by task, on a day-to-day basis.



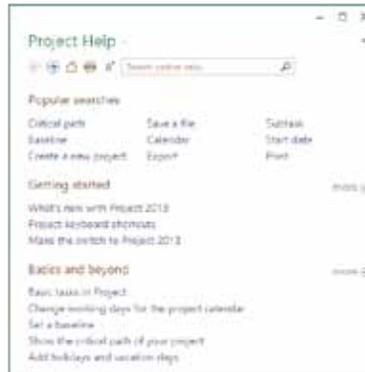
In addition to letting you view the project schedule at the strategic (high-level) and operational (detailed-level), the Gantt Chart view also allows you to insert and edit tasks, and allocate the people and other resources to work on the tasks. You can set milestones and deadlines, and generally keep track of your project and the resources working on it.

# Getting Help

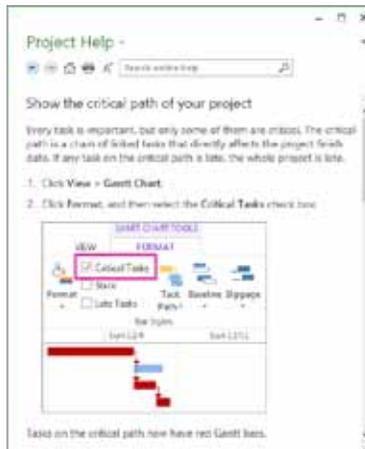
Getting extensive help in Project is fairly straightforward, and is only ever a couple of clicks away:

1 Click on the question mark at the top right-hand side of the Project window or press the F1 function key to open the initial help dialog box, as illustrated below

2 Click on any of the subjects under Popular searches, Getting started or Basics and beyond (for example “Critical path” under “Popular searches”, as illustrated right) to open up a list of all the relevant help articles on that subject (not illustrated)



3 Click on any of the listed articles to open it up (for example, “Show the critical path of your project” has been selected in the illustration on the right)



4 If you can't see what you are looking for, click in the “Search online help” box at the top of the help dialog box and type a description of what you want help with

5 At the bottom of the list, Help also provides suggestions for other areas you can explore (as illustrated right)



# Summary

- Microsoft Project can help you to plan and schedule your project, allocate tasks, and track progress and costs
- One thing Project can't do for you is manage the actual work of your project. Around 50% of projects fail for reasons that are known and understood. This book includes some proven project management concepts to help you make sure your project is a success
- Project 2013 now features a new cleaner look, that is designed to be easier to use, in line with the rest of the Microsoft Office suite
- OfficeArt is now supported in project reports, enabling the creation and editing of pictures, tables, charts, shapes and text boxes in reports
- Project 2013 now provides a completely new set of report templates, which use the OfficeArt infrastructure, and can be used to create dynamic reports without the need to export data to another program
- The creation of data cubes is still supported, allowing the export of data to pivot tables in Excel and pivot diagrams in Visio Professional for more sophisticated reporting
- One of the more significant additions is the facility to produce burndown charts or reports, with some additional data fields to support this functionality
- Task Paths is another new feature, similar to the critical path function, that enables the highlighting of the chain of any tasks that are linked to the selected task
- Gantt Chart view is the most useful view in Project, and the one in which you will probably choose to do most of your work. At the summary level it is great for communicating strategically, while at the detailed level it is great for working with the team on a day-to-day basis
- Getting help is only a mouse-click away, or you can use the F1 key to go direct to the Project Help dialog box and full help contents