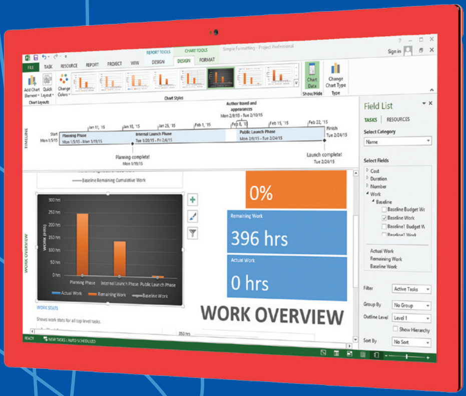
Microsoft

Step by Step


0%
Remaining Work
396 hrs
Actual Work
0 hrs
WORK OVERVIEW
Field List
TASKS
RESOURCES

Build exactly the skills you need.
Learn at the pace you want.

Microsoft Project 2013

Carl Chatfield, PMP, and Timothy Johnson, MCTS

Practice files
plus ebook

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Introduction

Microsoft Project 2013 is a powerful tool for creating and managing projects. *Microsoft Project 2013 Step by Step* offers a comprehensive look at the features of Project that most people will use most frequently.

Who this book is for

Microsoft Project 2013 Step by Step and other books in the Step by Step series are designed for beginning to intermediate-level computer users. Examples shown in the book generally pertain to small and medium organizations but teach skills that can be used in organizations of any size. Whether you are already comfortable working in Project and want to learn about new features in Project 2013 or are new to Project, this book provides invaluable hands-on experience so that you can plan, track, and manage projects.

How this book is organized

This book is divided into four parts:

- Part 1 introduces you to the rich field of project management and shows you the major parts of the Project 2013 interface.
- Part 2 takes you through a complete project life cycle (planning, tracking, and managing) with a streamlined use of Project features and capabilities.
- In Part 3, you complete another project life cycle, this time with more in-depth use of the powerful capabilities of Project.
- Part 4 wraps up your training with Project with activities that can be applied at any point in a project life cycle.

In addition, this book includes several appendices. The appendices give you broader exposure to the field of project management, collaboration features in Project that are enhanced with SharePoint and Project Web App, and some suggestions for using this book in a classroom setting.

This book's iterative focus on completing a full project life cycle takes you through planning and then into the areas of tracking progress and responding to variance, where Project's feature set really shines.

This book has been designed to lead you step by step through all the tasks you're most likely to want to perform with Project 2013. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to manage complex projects. However, each topic is self-contained, so you can jump in anywhere to acquire exactly the skills you need.

Download the practice files

Before you can complete the exercises in this book, you need to download the book's practice files to your computer. These practice files can be downloaded from the following page:

http://aka.ms/Project2013sbs/files

The same set of practice files works with both Microsoft Project Professional 2013 and Microsoft Project Standard 2013. Differences between the two editions of Project are explained where needed throughout the book.

IMPORTANT The Project 2013 program is not available from this website. You should purchase and install that program before using this book.

The following table lists the practice files for this book.

Chapter	File
Chapter 1: Microsoft Project, project management and you	No practice file
Chapter 2: A guided tour of Project	Guided Tour_Start.mpp
Chapter 3: Starting a new plan	No practice file
Chapter 4: Building a task list	Simple Tasks_Start.mpp
Chapter 5: Setting up resources	Simple Resources_Start.mpp
Chapter 6: Assigning resources to tasks	Simple Assignments_Start.mpp
Chapter 7: Formatting and sharing your plan	Simple Formatting_Start.mpp
Chapter 8: Tracking progress	Simple Tracking_Start.mpp

Chapter	File
Chapter 9: Advanced task scheduling	Advanced Tasks_Start.mpp
Chapter 10: Fine-tuning task details	Fine Tuning Tasks_Start.mpp
Chapter 11: Fine-tuning resource and assignment details	Advanced Resources_Start.mpp Advanced Assignments_Start.mpp
Chapter 12: Fine-tuning the Project plan	Advanced Plan_Start.mpp
Chapter 13: Organizing project details	Advanced Organizing_Start.mpp
Chapter 14: Tracking progress on tasks and assignments	Advanced Tracking A_Start.mpp Advanced Tracking B_Start.mpp Advanced Tracking C_Start.mpp Advanced Tracking D_Start.mpp
Chapter 15: Viewing and reporting project status	Reporting Status_Start.mpp
Chapter 16: Getting your project back on track	Back on Track_Start.mpp
Chapter 17: Applying advanced formatting and printing	Advanced Formatting_Start.mpp
Chapter 18: Advanced report formatting	Advanced Reporting_Start.mpp
Chapter 19: Customizing Project	Customizing A_Start.mpp Customizing B_Start.mpp
Chapter 20: Sharing information with other programs	Sharing_Start.mpp Sample Task List.xlsx
Chapter 21: Consolidating projects and resources	Consolidating A_Start.mpp Consolidating B_Start.mpp

Your settings in Project

There are many settings that can affect the results you see as you complete the exercises in this book—especially settings relating to how Project calculates schedules. When working with Project, there are two levels of detail at which such settings apply:

- Settings unique to the Project file
- Settings that apply to all Project files you work with in Project

We've already made all the necessary settings possible in the practice files you'll use with this book. However, your installation of Project might have settings that differ from the "factory default" settings, and it could produce results that differ from what's shown in this book. If you don't get the results you expect, check these settings.

This setting	Should be
File > Options >General tab >Default View	Gantt with Timeline
File > Options >Display tab >Show Indicators and Options Buttons For	All options here should be selected
File > Options > Schedule tab > Show Assignment Units As A	Percentage
File > Options > Schedule tab >Calculation > Calculate Project After Each Edit	On
File > Options > Save tab > Save Files In This Format	Project (*.mpp)
File > Options > Advanced tab > Edit	All options here should be selected
File > Options > Advanced tab > Display > Show Status Bar	Selected
File > Options > Advanced tab > Display > Show Scroll Bars	Selected
Resources > Level > Leveling Options > Leveling Calculations	Manual
Resources > Level > Leveling Options > Look for Overallocations On A	Day By Day

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With the ebook edition of this book, you can do the following:

- Search the full text
- Print
- Copy and paste

To download your ebook, see the instruction page at the back of the book.

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The following sections provide information about getting help with this book and contacting us to provide feedback or report errors.

Errata

We’ve made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site, which you can find at:

http://aka.ms/Project2013sbs/errata

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Introduction to Microsoft Project

1 Microsoft Project, project management, and you 3

2 A guided tour of Project 12

Microsoft Project, project management and you

1

IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Describe the high-level benefits of a dedicated project planning and management tool like Project.
- Distinguish between Project Standard and Project Professional.
- Identify the major new features introduced in the 2013 edition, as well as in the several prior releases of Project, and where in this book you'll find hands-on activities with those features.
- Begin to develop your own skills development strategy for mastering Project in the context of good project-management practice.

Thank you for adding this book to your Microsoft Project 2013 skills development plan. This book is designed as a self-paced tutorial, and you can also use it as a reference. Most of the chapters that follow include hands-on activities in Project.

This chapter does not involve hands-on work in Project. Instead, read it to better understand how Project and project management fit with your personal skills development goals. This chapter introduces you to Microsoft Project 2013 and the field of project management.

Meet the Project application

Microsoft Project 2013 can be the go-to tool in your project-management toolbox. This book explains how to use Project to build schedules (which we'll generally call *plans*) complete with ***tasks*** and ***resources***, use the extensive formatting features in Project to organize and format the plan's details, track actual work against the plan, share status, and take corrective action when things get off track.

TIP Terms formatted ***like this*** are defined in the Glossary at the end of this book.

Project is a powerful application that helps you plan and manage a wide range of projects. From meeting crucial deadlines and budgets to selecting the right resources, you can be more productive and realize better results using the set of features Project offers. You can use Project to do the following:

- Create plans at the level of detail that's right for your project. Work with summary data initially, or shift to a more detailed approach when it's convenient.
- Control what tasks Project can schedule automatically or that you'll schedule manually.
- Manage tasks, costs, work, and resources at whatever level of detail is appropriate for your project's needs.
- Work with your plan's data in a variety of views and reports.
- Track and manage your plan throughout the life of the project.
- Collaborate and share data with others in your organization using rich view and report formatting options.
- Use resource pools, consolidated projects, and cross-project links to extend your project-management focus across multiple projects.

Project 2013 builds on previous versions to provide powerful project-management tools. The section "New features in Project 2013" later in the chapter catalogs the major new features from the last several releases of Project and includes cross-references to relevant, hands-on exercises in this book.

Meet the Project family

Project 2013 for your computer is available in two different editions:

- Project Standard is the entry-level desktop application with which you can create and modify plans.
- Project Professional includes all the functionality of Project Standard plus a few additional features you can use to create and modify plans. In addition, Project Professional can connect to Project Web App (PWA), the browser-based interface of Microsoft Project Server.

In addition to installing Project on your computer, you have other options for accessing Project and related services:

- Project Pro for Office 365 is an online subscription.
- Project Online is the online subscription to Microsoft's Project and Portfolio Management (PPM) solution built on Project Web App and Project Server.
- Project Online with Project Pro for Office 365.

TIP For more information about using Project with the SharePoint and PWA services, see Appendix C, "Collaborating: Project, SharePoint and PWA." To learn more about Project Online and Office 365 offerings, visit *office.microsoft.com/.*

This book focuses on the features in the Project Standard and Project Professional applications. When a feature that is unique to Project Professional appears, you'll see special instructions for users of both Project Standard and Project Professional.

New features in Project 2013

The 2013 version includes several new features as well as some improved ones, including the following:

- **Reports** Project 2013 replaces the old tabular reports feature with an entirely new way of visualizing your Project data. The new reports feature includes a dynamic mix of tables, charts, and textual content, and it's highly customizable. For more information, see, "Customizing reports" in Chapter 7, "Formatting and sharing your plan," and Chapter 18, "Advanced report formatting." The Microsoft Excel–supported and Microsoft Visio–supported visual reports feature remains in Project 2013, and it's described in "Generating visual reports with Excel and Visio" in Chapter 20, "Sharing Project information with other programs."
- **Task Path** Use this feature to quickly identify the Gantt bars of the selected task's predecessors and successors. For more information, see "See task relationships with Task Path" in Chapter 9, "Advanced task scheduling."
- **Redesigned Backstage and SkyDrive integration** Like other Microsoft Office 2013 applications, quick access to SkyDrive storage is now integrated into the Project 2013 Backstage view. For more information, see "The Backstage: Managing files and setting options" in Chapter 2, "A guided tour of Project."

- **A much later project finish date** The latest possible date Project can work with has been moved from December 31, 2049 to December 31, 2149.
- **Support for touch input** Like other Office 2013 applications, you can optimize the Project interface (primarily the commands on the ribbon) for either touch or mouse input.
- **New cleaner look** As you use Project 2013, you will notice a flatter, cleaner interface. This new look is shared with other Office 2013 applications. Other new visual elements, such as the handy horizontal guidelines extending from the selected task across the chart portion of a Gantt Chart view, are unique to Project.
- **Lync integration (Project Professional only)** In Project Professional, you can import resource details from Active Directory. (To do this, on the Resource tab, in the Insert group, click Add Resources and then click Active Directory.) In Project, you can then view resource presence information (including availability and whatever other details are supported by your organization's implementation of Active Directory). You can also start a Lync chat or create an email message to the resource directly from Project.
- **Support for apps for Office** Project 2013 supports third-party add-ins and apps available from the Office Store, located at *office.microsoft.com/store*.

If you're upgrading to Project 2013 from a previous version, you're probably most interested in the differences between the old and new versions and how they will affect you. The following sections list new features introduced in Project 2010 and Project 2007. These features are also present in Project 2013 and, depending on the version of Project from which you are upgrading, might be new to you.

What was new in Project 2010

The 2010 version included several new features and some improved ones, including the following:

- **The Microsoft Office Fluent interface (the "ribbon")** No more hunting through menus, submenus, and dialog boxes. This new interface organizes all the commands that most people use in a new way, making them quickly accessible from tabs at the top of the application window. For more information, see "The ribbon and tabs: Finding the features you want" in Chapter 2.

- **The Backstage view** All the tools you need to work with your files are accessible from one location. For more information, see "The Backstage: Managing files and setting options" in Chapter 2.
- **Manually scheduled tasks** Begin creating tasks with whatever information (numeric or text data) you might have, and don't worry about automatic scheduling of tasks until you're ready. Manually scheduled tasks are not affected by changes in duration, start or finish dates, dependencies, or other issues that otherwise would cause Project to reschedule a task. You can then switch individual tasks or an entire plan from manual to automatic scheduling. For more information, see "Entering task names" and "Switching task scheduling from manual to automatic" in Chapter 4, "Building a task list."
- **Timeline view** Create a "project at a glance" view that includes just the summary tasks, tasks, and milestones that you choose. Easily copy the Timeline view as a graphic image to paste into other applications. For more information, see "Customizing a Timeline view" in Chapter 7.
- **Better pasting to Excel and Word** Paste Project data into Excel or Word and preserve the column headings and outline structure of your Project data. For more information, see "Copying Project data to other programs" in Chapter 20.
- **Customizable ribbon** Create your own tabs and groups to suit the way you work. For more information, see Chapter 19, "Customizing Project."
- **Custom fields** Just start typing a numeric value, date value, or text string into the rightmost column in a table, and Project will identify the right data type. For more information, see "Create custom fields" in Chapter 13, "Organizing project details."
- **AutoFilter improvements** Use Excel-like filtering, as well as sorting and grouping, right from AutoFilter arrows on column headings. For more information, see "Filtering Project details" in Chapter 13, "Organizing Project details."
- **Save as PDF or XPS** Create PDF or XPS format documents directly from Project. For more information, see "Printing and exporting views" in Chapter 17, "Applying advanced formatting and printing."
- **Team Planner view (Project Professional only)** Perform actions like reassigning a task from one resource to another with simple drag and drop actions in the Team Planner view. For more information, see "Adjusting assignments in the Team Planner view" in Chapter 11, "Fine-tuning resource and assignment details."

- **Inactivate tasks (Project Professional only)** Disable (but don't delete) selected tasks from a plan so that they have no effect on the overall schedule but can be reactivated later if you need them. For more information, see "Inactivating tasks" in Chapter 12, "Fine-tuning the project plan."
- **SharePoint Task List integration** (**Project Professional only)** Publish and synchronize tasks between Project and a Microsoft SharePoint list. For more information, see Appendix C.

What was new in Project 2007

The 2007 version included several new features and some improved ones, including the following:

- **Visual reports** Export Project task, resource, or assignment details to Excel or Visio in a highly structured graphical format. For more information, see "Generating visual reports with Excel and Visio" in Chapter 20.
- **Change highlighting** See what values changed throughout a plan immediately after you make a change to a calculated task, resource, or assignment value.
- **Cost resources** Assign this special type of resource to tasks to accrue categories of costs you want to track, like travel or entertainment. For more information, see "Assigning cost resources to tasks" in Chapter 6, "Assigning resources to tasks."
- **Task Inspector pane** Called the Task Driver pane in Project 2007, the Task Inspector pane shows you details that affect the scheduling of a selected task. For more information, see "Adjusting task link relationships" in Chapter 9.
- **Multi-Level Undo** Back out of a series of actions when you need to.
- **Calendar working-time exceptions** Record not just the date, but also an explanation of a resource or project calendar working-time exception. For more information, see "Setting nonworking days in the project calendar" in Chapter 3, "Starting a new plan."

You as a project manager

Project management is a broadly practiced art and science. If you're reading this book, chances are that you're either seriously involved in project management or you want to be.

Project is unique among the Microsoft Office applications in that Project is a specialized tool designed for the specific domain of project management. You might be invested in your professional identity as a project manager, or you might not identify yourself with project management at all. Either way, your success as a user of Project, to a large degree, will be related to your success as a project manager. Let's take a moment to explore this subject.

At its heart, project management is a combination of skills and tools that help you predict and control the outcomes of endeavors undertaken by your organization. Your organization might be involved in other work apart from projects. ***Projects*** (such as publishing a new children's book) are distinct from ***ongoing operations*** (such as running payroll services). Projects are defined as *temporary endeavors undertaken to create some unique deliverable or result*. With a good project-management system in place, you should be able to answer such questions as the following:

- What tasks must be performed, and in what order, to produce the deliverable of the project?
- When should each task be performed, and what is the final ***deadline***?
- Who will complete these tasks?
- How much will it cost?
- What if some tasks are not completed as scheduled?
- What's the best way to communicate project details to those who have an interest or stake in the project?

Good project management does not guarantee the success of every project, but poor project management often leads to failure.

A core principle of this book's instructional strategy is that success with Project is built on success with basic project-management practice. Although Project is a feature-rich application, mastery of its features alone is no guarantee of success in project management.

For this reason, you will find material about project-management practice throughout this book. See, for example, the following:

- The many "Project management focus" sidebars throughout the chapters
- Appendix A, "A short course in project management"
- Appendix B, "Developing your project-management skills"

Let's get started!

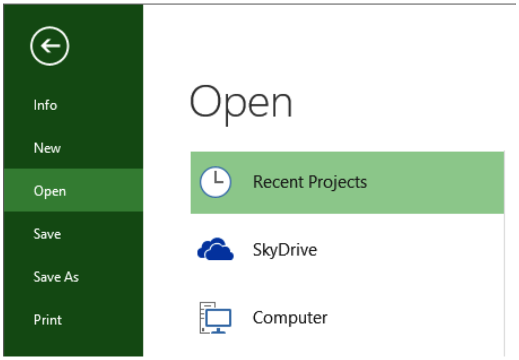
Throughout this book, you will play the role of a project manager at a fictitious children's book publishing company, Lucerne Publishing. Each new book (even this one) constitutes its own project; in fact, some are complex projects involving costly resources and aggressive deadlines. We think you'll be able to recognize many of the scheduling problems that the project managers at Lucerne Publishing encounter and transfer their strategies and solutions to your own scheduling needs.

We've been working with Project since it debuted for Microsoft Windows, and each version has offered something that made project planning and management a little easier. Project 2013 continues that tradition for desktop project management, and we look forward to showing you around.

Chapter at a glance

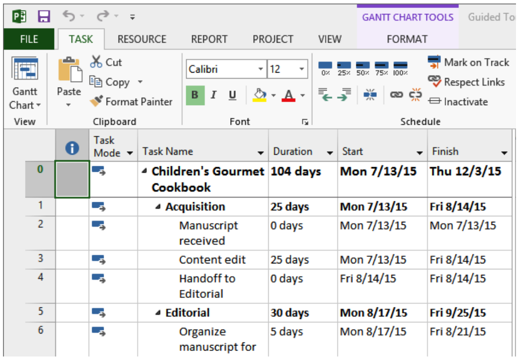
Manage

Explore the Backstage view, the interface for file management and other features, page 17.


Info
New
Open
Save
Save As
Print
Open
Recent Projects
SkyDrive
Computer

Navigate

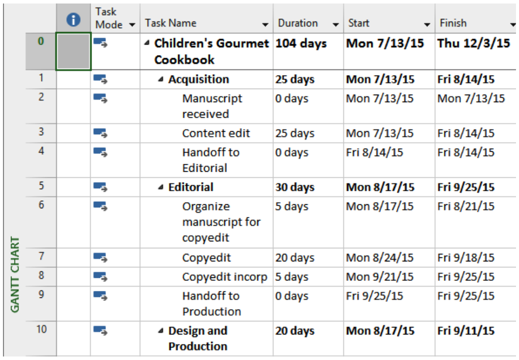
Walk through the tabs and ribbon of the Project interface, page 21.


GANTT CHART TOOLS
Guided To
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Gantt Chart
Paste
Cut
Copy
Format Painter
Calibri
12
B
I
U
0%
25%
50%
75%
100%
Mark on Track
Respect Links
Inactivate
View
Clipboard
Font
Schedule

		Task Mode	Task Name	Duration	Start	Finish
0			**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1			**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2			Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3			Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4			Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5			**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6			Organize manuscript for	5 days	Mon 8/17/15	Fri 8/21/15

View

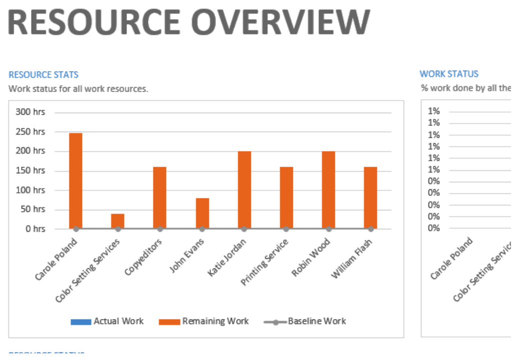
Use different views to see Project data the way you want it, page 27.


GANTT CHART

		Task Mode	Task Name	Duration	Start	Finish
0			**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1			**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2			Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3			Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4			Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5			**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6			Organize manuscript for copyedit	5 days	Mon 8/17/15	Fri 8/21/15
7			Copyedit	20 days	Mon 8/24/15	Fri 9/18/15
8			Copyedit incorp	5 days	Mon 9/21/15	Fri 9/25/15
9			Handoff to Production	0 days	Fri 9/25/15	Fri 9/25/15
10			**Design and Production**	**20 days**	**Mon 8/17/15**	**Fri 9/11/15**

Report

Convey your plan's data in compelling new formats, page 33.


RESOURCE OVERVIEW
RESOURCE STATS
Work status for all work resources.
300 hrs
250 hrs
200 hrs
150 hrs
100 hrs
50 hrs
0 hrs
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
Actual Work
Remaining Work
Baseline Work
WORK STATUS
% work done by all the
1%
1%
1%
1%
1%
1%
0%
0%
0%
0%
0%
0%
Carole Poland
Color Setting Servic

A guided tour of Project

2

IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Use the Backstage view to share and manage Project files.
- Work with commands on different tabs of the ribbon interface.
- Apply different views to see information presented in different ways.
- Use reports to quickly communicate the status of your plan.

This chapter leads you on a fast-paced tour of Microsoft Project 2013. If you are new to Project, you'll see the essential features and activities that make it such a powerful application. In this chapter, you'll be introduced to many of the Project features and conventions that you'll work with throughout this book.

PRACTICE FILES Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. A complete list of practice files is provided in "Download the practice files" at the beginning of this book. For each exercise that has a practice file, simply browse to where you saved the book's practice file folder.

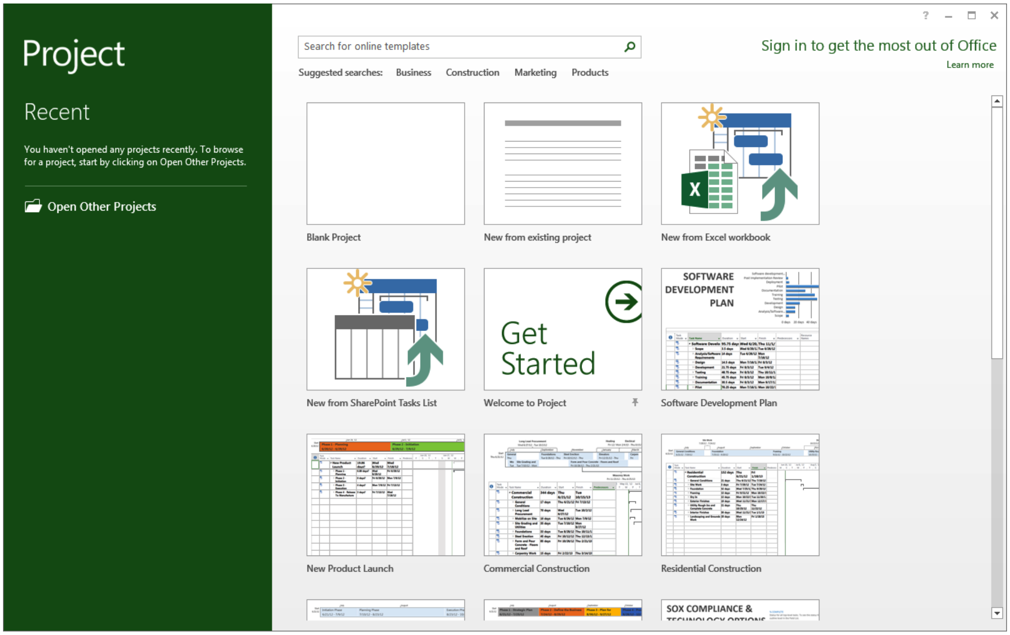
IMPORTANT If you are running Project Professional with Project Web App/Project Server, take care not to save any of the practice files you work with in this book to Project Web App (PWA). For more information, see Appendix C, "Collaborating: Project, SharePoint, and PWA."

The Project interface: Finding your way around

You can start Project from the Start menu (in Windows 7) or Start screen (in Windows 8), or by opening a Microsoft Project file. In this exercise, you'll start Project without opening a file and then examine the major parts of the interface.

1. Do one of the following:
   - If you are running Windows 7: On the **Start** menu, point to **All Programs**, click **Microsoft Office**, and then click **Project 2013**.
   - If you are running Windows 8: On the Start screen, tap or click **Project 2013.**

   Project's start screen appears. Here you can quickly open a plan that was recently opened, open some other plan, or create a new plan based on a template.


Project
Recent
Open Other Projects
Search for online templates
Suggested searches:
Business
Construction
Marketing
Products
Learn more
Blank Project
New from existing project
New from Excel workbook
New from SharePoint Tasks List
Get Started
Welcome to Project
SOFTWARE DEVELOPMENT PLAN
Software Development Plan
New Product Launch
Commercial Construction
Residential Construction
SOX COMPLIANCE &

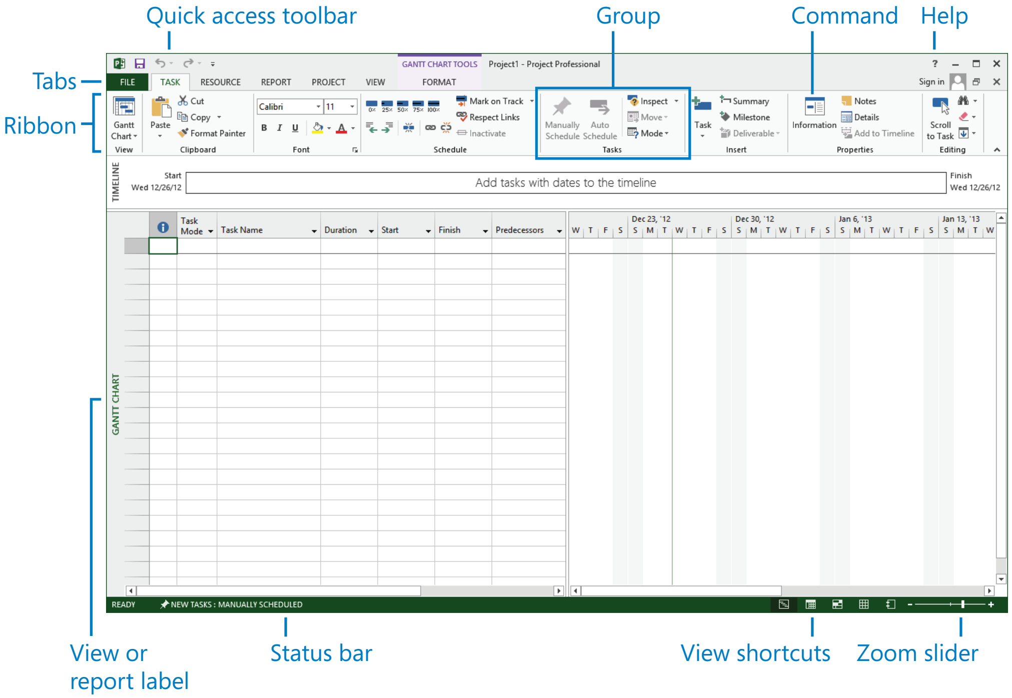
You haven't opened any projects recently. To browse for a project, start by clicking on Open Other Projects.

Sign in to get the most out of Office

TIP If the start screen did not appear when you started Project, do the following. On the File tab, click Options. In the Project Options dialog box, click General, and under Start Up Options, click Show The Start Screen When This Application Starts.

2. Click **Blank Project**.

   Your screen should look similar to the following illustration:

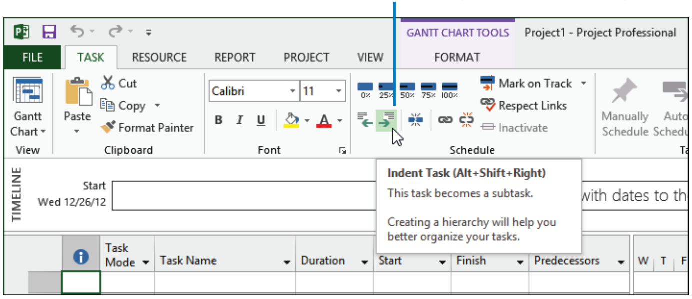

Quick access toolbar
Group
Command
Help
Tabs
Ribbon
View or report label
Status bar
View shortcuts
Zoom slider

The Project window you see on your screen might differ from what's shown in this book. This might depend on your screen resolution and any previous customizations made to Project on your computer.

Let's walk through the major parts of the Project interface:

- The **Quick Access Toolbar** is a customizable area of the interface where you can add your favorite or frequently used commands. For more information, see Chapter 19, "Customizing Project."
- **Tabs** on the **ribbon** replace the pull-down menus and toolbars that you might be familiar with. Tabs group high-level focus areas of Project together. The ***ribbon*** contains the commands you use to perform actions in Project.
- **Groups** are collections of related commands. Each tab is divided into multiple groups.

- **Commands** are the specific features you use to perform actions in Project. Each tab contains several commands. Some commands, like Cut on the Task tab, perform an immediate action. Other commands, like Change Working Time on the Project tab, display a dialog box or prompt you to take further action in some other way. You can see a description of most commands by pointing the mouse pointer at the command.


GANTT CHART TOOLS
Project1 - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Gantt Chart
View
Paste
Cut
Copy
Format Painter
Clipboard
Calibri
11
B
I
U
Font
0%
25%
50%
75%
100%
Mark on Track
Respect Links
Inactivate
Schedule
Manually Schedule
Auto Schedu
TIMELINE
Start
Wed 12/26/12
with dates to th
Task Mode
Task Name
Duration
Start
Finish
Predecessors
W
T
F

Point at a command to see a description in a tooltip.

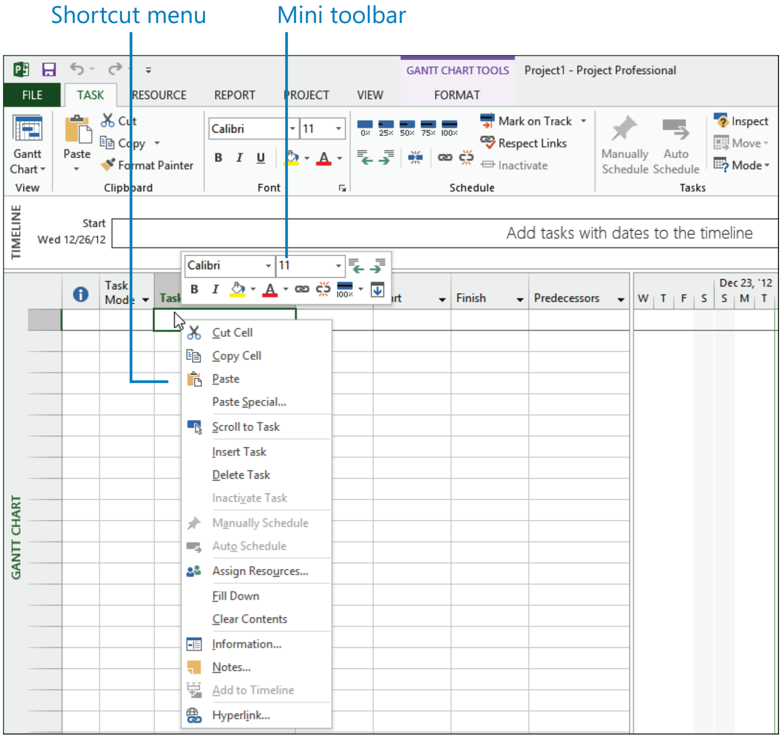
Indent Task (Alt+Shift+Right)

This task becomes a subtask.

Creating a hierarchy will help you better organize your tasks.

- The active view appears in the main window of Project. Project can display a single view or multiple views in separate panes.
- The **View label** appears along the left edge of the active view. Project includes dozens of views, so this is a handy reminder of what your active view is.
- **View shortcuts** let you quickly switch between some of the more frequently used views in Project. The **Zoom Slider** zooms the active view in or out.
- The **Status bar** displays some important details like the scheduling mode of new tasks (manual or automatic) and whether a filter has been applied to the active view.
- ***Shortcut menus*** and **Mini Toolbars** are accessible via right-clicking most items you see in a view.

  TIP Here's a good general practice. When you're not sure what actions you can perform with something you see in Project, right-click on the item and see what commands are available for that item.


Shortcut menu
Mini toolbar
GANTT CHART TOOLS
Project1 - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Gantt Chart
Paste
Cut
Copy
Format Painter
Clipboard
View
Calibri
11
Font
Schedule
Mark on Track
Respect Links
Inactivate
Manually Schedule
Auto Schedule
Inspect
Move
Mode
Tasks
TIMELINE
Start
Wed 12/26/12
Add tasks with dates to the timeline
Task Mode
Finish
Predecessors
Dec 23, '12
GANTT CHART
Cut Cell
Copy Cell
Paste
Paste Special...
Scroll to Task
Insert Task
Delete Task
Inactivate Task
Manually Schedule
Auto Schedule
Assign Resources...
Fill Down
Clear Contents
Information...
Notes...
Add to Timeline
Hyperlink...

Next, you'll use the Backstage view to open a sample plan.

The Backstage view: Managing files and setting options

The ***Backstage view*** is a part of the Project interface, and you will see a similar Backstage view in most other Office 2013 applications. The Backstage view contains customization and sharing options, as well as the essential commands for file management like Open, New, and Save.

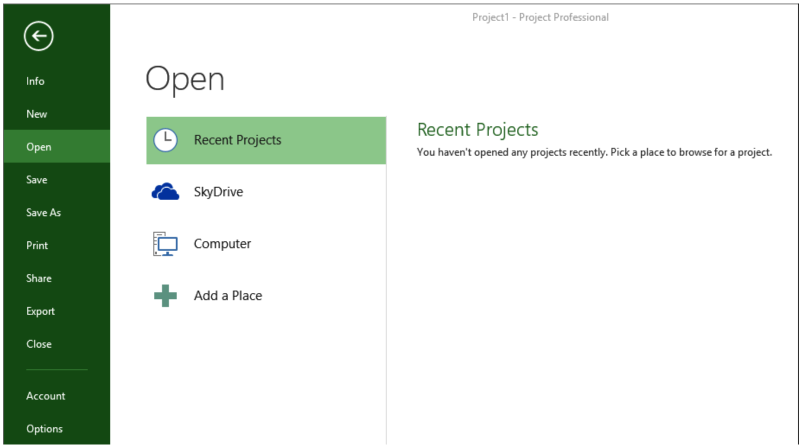
In this exercise, you navigate to the Backstage view and see its major parts.

1. Click the **File** tab.

   Project displays the Backstage view.

2. If the Open screen is not already visible, on the left side of the Backstage view click the **Open** tab.

   Project displays options for opening files, as well as a list of recently opened files.


Project1 - Project Professional
Info
New
Open
Save
Save As
Print
Share
Export
Close
Account
Options
Open
Recent Projects
SkyDrive
Computer
Add a Place
Recent Projects

You haven't opened any projects recently. Pick a place to browse for a project.

Here is a brief list of the tabs in the Backstage view. In most cases, you can click the tab name to see more options:

- **Info** gives you access to the Organizer, a feature used to share customized elements like views between plans; the Organizer is described in Chapter 19. Info also shows you information about the active plan like its start and finish date, statistics, and advanced properties. You work with advanced properties in Chapter 3, “Starting a new plan.” If you’re using Project Professional with the Project Web App, you also have access to your account details.
- **New** displays options for creating a new plan, either from scratch or based on a template. You’ll use the New command in the next section.
- **Open**, **Save**, **Save As**, and **Close** are standard file-management commands.
- **Print** includes options for printing a plan, as well as the print preview. You’ll work with printing options in Chapter 7, “Formatting and sharing your plan” and in Chapter 17, “Applying advanced formatting and printing.”

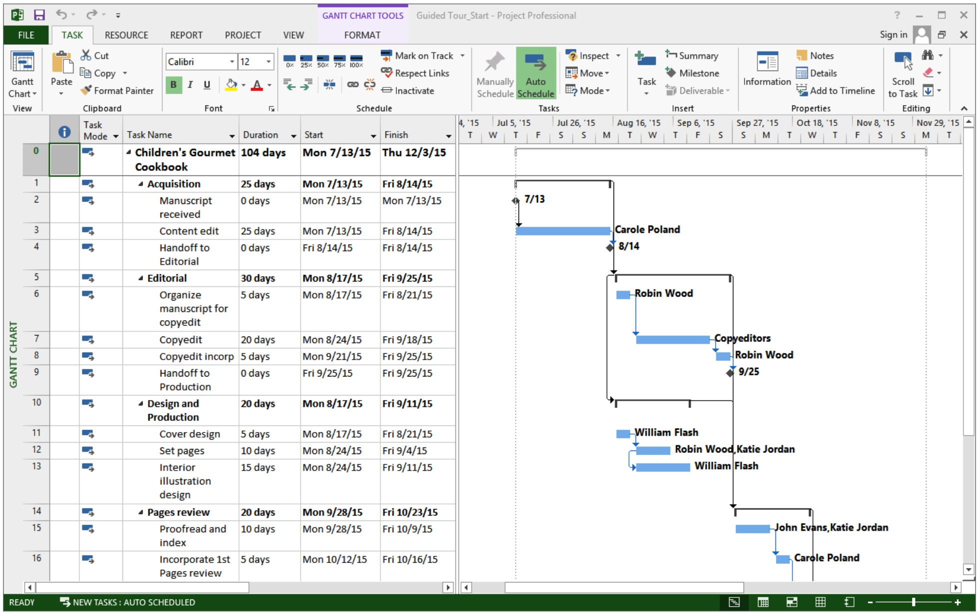
- **Share** includes options for SharePoint synchronization and attaching a plan to an e-mail message.
- **Export** includes options for generating a Portable Document Format (PDF) or XML Paper Specification (XPS) format file of the plan, and other options for exporting content. You'll work with these features in Chapter 20, "Sharing Project information with other programs."
- **Account** displays connected services as well as information about Project such as version information. With a Microsoft account, you can use services such as streaming Office applications, SkyDrive file storage, and roaming personal settings. When you are signed in, your user information appears in the upper-right corner of the Project window.
- **Options** displays the Project Options dialog box. This dialog box itself contains several tabs through which you can adjust a wide range of behaviors in Project, such as whether you want to see the start screen when Project starts.

TIP To exit the Backstage view, click the Back button in the upper-left corner of the Backstage screen. You can also press the Escape key.

Next, you'll open the practice file that you'll work with through the rest of this chapter. Recall from earlier that you need to copy the book's practice files to your computer. A complete list of practice files is provided in "Download the practice files" at the beginning of this book.

3. If the Open screen is not already visible in the Backstage, click **Open**.
4. Click **Computer**, click **Browse**, and then navigate to the Chapter02 practice file folder.
5. Open **Guided Tour_Start** from the Chapter02 practice file folder.

   The practice file opens.


GANTT CHART TOOLS
Guided Tour_Start - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Sign in
Gantt Chart
Paste
Cut
Copy
Format Painter
Calibri
12
Mark on Track
Respect Links
Inactivate
Manually Schedule
Auto Schedule
Inspect
Move
Mode
Task
Summary
Milestone
Deliverable
Information
Notes
Details
Add to Timeline
Scroll to Task
View
Clipboard
Font
Schedule
Tasks
Insert
Properties
Editing
GANTT CHART
7/13
Carole Poland
8/14
Robin Wood
Copyeditors
Robin Wood
9/25
William Flash
Robin Wood,Katie Jordan
William Flash
John Evans,Katie Jordan
Carole Poland
READY
NEW TASKS : AUTO SCHEDULED

	Task Mode	Task Name	Duration	Start	Finish
0		**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1		**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2		Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3		Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4		Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5		**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6		Organize manuscript for copyedit	5 days	Mon 8/17/15	Fri 8/21/15
7		Copyedit	20 days	Mon 8/24/15	Fri 9/18/15
8		Copyedit incorp	5 days	Mon 9/21/15	Fri 9/25/15
9		Handoff to Production	0 days	Fri 9/25/15	Fri 9/25/15
10		**Design and Production**	**20 days**	**Mon 8/17/15**	**Fri 9/11/15**
11		Cover design	5 days	Mon 8/17/15	Fri 8/21/15
12		Set pages	10 days	Mon 8/24/15	Fri 9/4/15
13		Interior illustration design	15 days	Mon 8/24/15	Fri 9/11/15
14		**Pages review**	**20 days**	**Mon 9/28/15**	**Fri 10/23/15**
15		Proofread and index	10 days	Mon 9/28/15	Fri 10/9/15
16		Incorporate 1st Pages review	5 days	Mon 10/12/15	Fri 10/16/15

To conclude this exercise, you'll save the practice file with a different name.

6 On the **File** tab, click **Save As**.

7 Click **Computer**, click **Browse**, and then navigate to the Chapter02 practice file folder.

8 In the **File name** box, type **Guided Tour**, and then click **Save**.

Templates: Avoid reinventing the wheel

Instead of creating a plan from scratch, you might be able to use a ***template*** that includes much of the initial information you need, like task names and relationships. Sources of templates include:

- Templates installed with Project. These can vary depending on the installation options that were selected when Project was installed on your computer.
- Templates from the Office Online website, *www.office.com*. Microsoft makes a large number of Project templates available for free download via the web.
- Templates within your organization. You might be in an organization that has a central library of templates. Often, such templates contain detailed task definitions, resource assignments, and other details that are unique to the organization.

To see available templates, click the File tab and then click New. Templates also appear on Project's start screen.

In addition, Project can generate a new file based on existing files from Project or other applications. (On the File tab, click New, and then click New From Existing Project, New From Excel Workbook, or New From SharePoint Tasks List.)

You can also create templates from your plans for later use or to share. One common concern with sharing plans is they might contain sensitive information like resource pay rates. You can save a plan as a template and clear such information, as well as schedule progress.

1. On the **File** tab, click **Save As.**
2. Navigate to the folder where you want to create the new template based on your plan.
3. In the **Save as type** box, click **Project Template**.
4. In the **File Name** box, enter the template file name that you want, and then click **Save**.
5. When the **Save As Template** dialog box appears, select the types of information, such as resource pay rates, that you want removed from the template.

The original plan is not affected.

The ribbon and tabs: Finding the features you want

Similar to other Office 2013 applications, Project 2013 uses the Fluent interface, commonly called the *ribbon*. The most prominent parts of this interface are the tabs and ribbon that span the top of the Project window. In this section, you'll work with the tabs to see how they are organized.

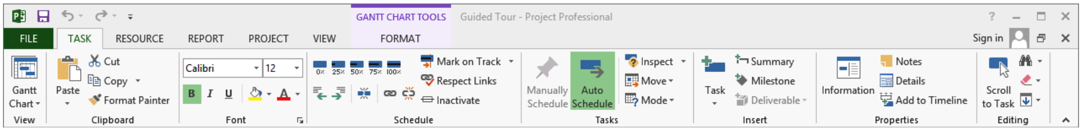
These tabs logically group the commands that apply to major parts of Project together:

- The **Task** and **Resource** tabs relate to the data you frequently work with in Project.
- The **Report** tab contains commands you can use to view reports and compare two plans.

- The **Project** tab contains commands that usually apply to the entire plan, such as setting the plan's working time.
- The **View** tab helps you control what you see in the Project window and how that information appears.
- Contextual tabs, such as the **Format** tab (other contextual tabs you might see include **Design** and **Layout**) will vary, depending on what kind of information is displayed in the active view, or what kind of item is selected at the time. For example, when a task view like the ***Gantt Chart view*** is displayed, the commands on the Format contextual tab apply to tasks and Gantt Chart items like Gantt bars. The current context of the Format tab appears above the tab label—Gantt Chart Tools, for example.

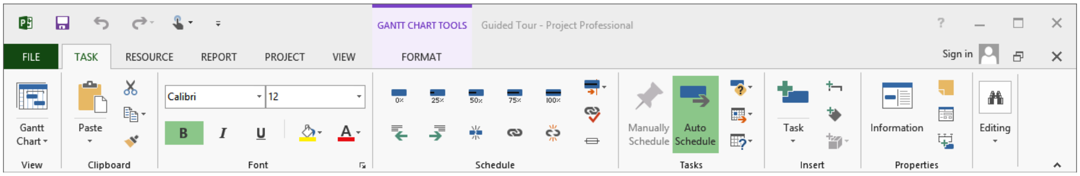
TIP You can double-click a tab label to collapse or expand the ribbon. You can also view a collapsed tab by single-clicking the tab label, and then selecting the command you want.

Let's look more closely at the tabs.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Sign in
Gantt Chart
View
Paste
Cut
Copy
Format Painter
Clipboard
Calibri
12
B
I
U
Font
0%
25%
50%
75%
100%
Mark on Track
Respect Links
Inactivate
Schedule
Manually Schedule
Auto Schedule
Inspect
Move
Mode
Tasks
Task
Summary
Milestone
Deliverable
Insert
Information
Notes
Details
Add to Timeline
Properties
Scroll to Task
Editing

Like all tabs, the Task tab contains a large number of commands, and these commands are organized into groups. The Task tab includes the View, Clipboard, Font, and other groups.

If you enabled touch input (on the Quick Access Toolbar in the upper-left corner of the Project window, click the Touch/Mouse Mode button), the commands on the ribbon appear larger and some lack text labels.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Sign in
Gantt Chart
View
Paste
Clipboard
Calibri
12
B
I
U
Font
0%
25%
50%
75%
100%
Schedule
Manually Schedule
Auto Schedule
Tasks
Task
Insert
Information
Properties
Editing

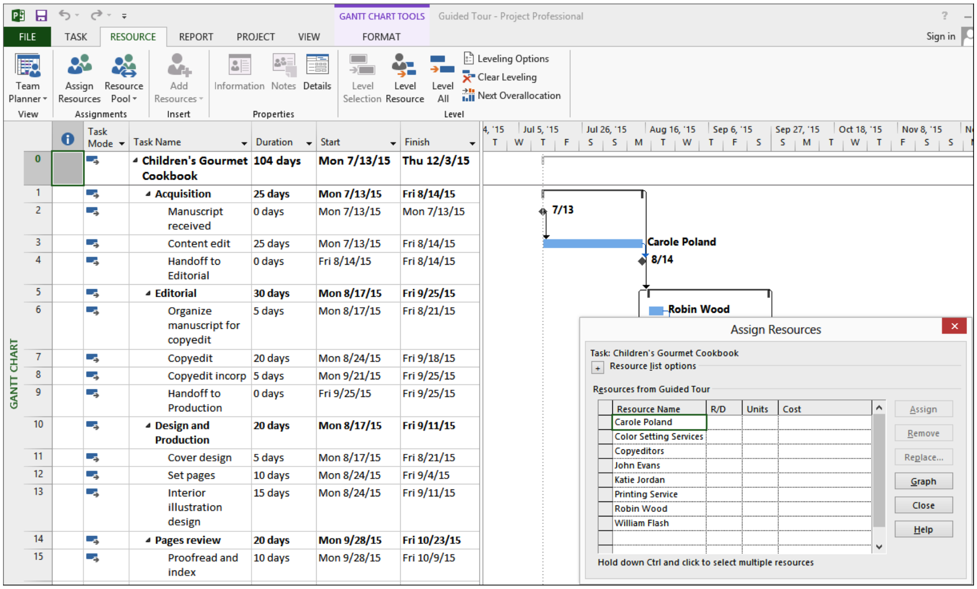
Some commands perform an immediate action, while other commands lead you to more options. Next, you'll look at different tabs and types of command buttons.

1 Click the **Resource** tab label.

The Resource tab replaces the Task tab.

2 In the **Assignments** group, click **Assign Resources**.

This command has an immediate effect; it displays the Assign Resources dialog box.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Sign in
Team Planner
Assign Resources
Resource Pool
Add Resources
Information
Notes
Details
Level Selection
Level Resource
Level All
Leveling Options
Clear Leveling
Next Overallocation
View
Assignments
Insert
Properties
Level
GANTT CHART
7/13
Carole Poland
8/14
Robin Wood

	Task Mode	Task Name	Duration	Start	Finish
0		**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1		**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2		Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3		Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4		Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5		**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6		Organize manuscript for copyedit	5 days	Mon 8/17/15	Fri 8/21/15
7		Copyedit	20 days	Mon 8/24/15	Fri 9/18/15
8		Copyedit incorp	5 days	Mon 9/21/15	Fri 9/25/15
9		Handoff to Production	0 days	Fri 9/25/15	Fri 9/25/15
10		**Design and Production**	**20 days**	**Mon 8/17/15**	**Fri 9/11/15**
11		Cover design	5 days	Mon 8/17/15	Fri 8/21/15
12		Set pages	10 days	Mon 8/24/15	Fri 9/4/15
13		Interior illustration design	15 days	Mon 8/24/15	Fri 9/11/15
14		**Pages review**	**20 days**	**Mon 9/28/15**	**Fri 10/23/15**
15		Proofread and index	10 days	Mon 9/28/15	Fri 10/9/15

Assign Resources

Task: Children's Gourmet Cookbook

Resource list options

Resources from Guided Tour

Resource Name	R/D	Units	Cost
Carole Poland			
Color Setting Services			
Copyeditors			
John Evans			
Katie Jordan			
Printing Service			
Robin Wood			
William Flash			

Assign
Remove
Replace...
Graph
Close
Help

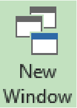
Hold down Ctrl and click to select multiple resources

You can leave the Assign Resources dialog box displayed while you perform other actions in Project. For now, though, you'll close it.

3 In the **Assign Resources** dialog box, click **Close**.

4 Click the **View** tab label.

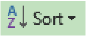
This tab contains a mixture of command types. As you can see, some commands, like New Window, just have a command label and icon.



Clicking this type of command performs an immediate action.

In most cases, such commands perform an immediate action.

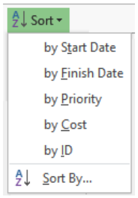
Other commands, like Sort, include a label and an arrow.



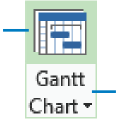
Clicking this type of command displays more options.

5 On the **View** tab, in the **Data** group, click **Sort**.

This command displays a list of sorting options.


Sort
by Start Date
by Finish Date
by Priority
by Cost
by ID
Sort By...

Another type of command, called a *split button*, can either perform an immediate action or show you more options. You'll look at one example now: the Gantt Chart button.

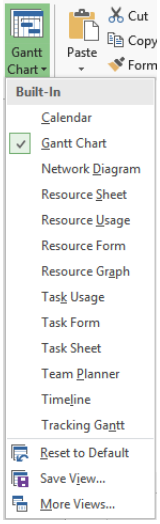

Gantt
Chart

Clicking the image part of this command performs the command's current setting.

Clicking the text label or arrow part of this command displays options and settings

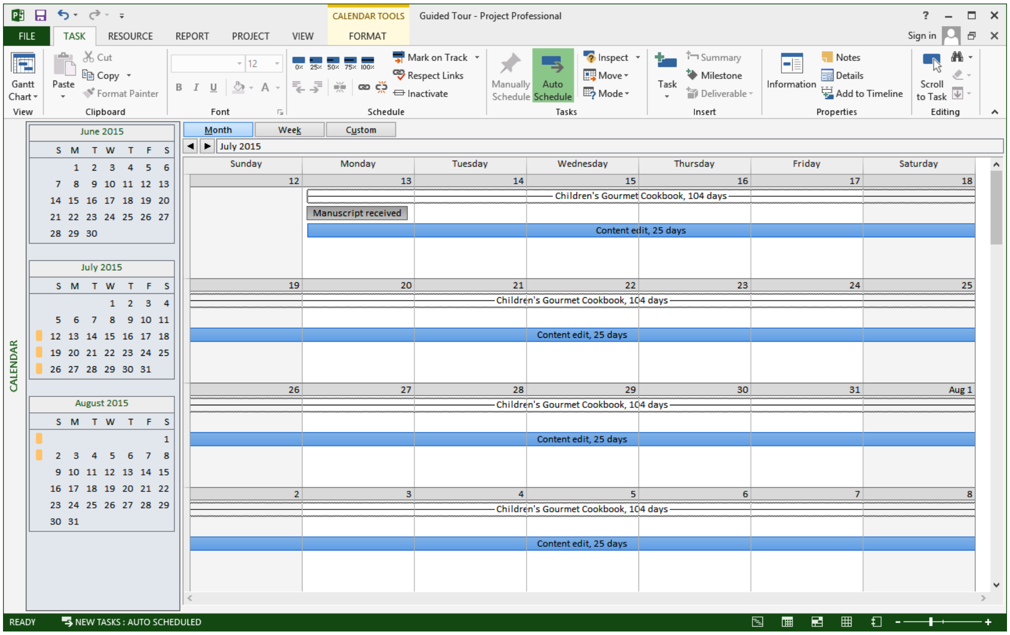
- Clicking the image part of this command immediately switches to the previously viewed Gantt chart view.
- Clicking the text label part of this command (or just the arrow for commands that have an arrow but no text label) shows you the available settings for that command.

6 On the **Task** tab, in the **View** group, click the **Gantt Chart** text label below the button image.


Gantt
Chart
Paste
Cut
Copy
Form
Built-In
Calendar
✓ Gantt Chart
Network Diagram
Resource Sheet
Resource Usage
Resource Form
Resource Graph
Task Usage
Task Form
Task Sheet
Team Planner
Timeline
Tracking Gantt
Reset to Default
Save View...
More Views...

7 In the list of views that appears, click **Calendar**.

Project switches to the Calendar view.


CALENDAR TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Sign in
Gantt Chart
View
Paste
Cut
Copy
Format Painter
Clipboard
Font
Mark on Track
Respect Links
Inactivate
Schedule
Manually Schedule
Auto Schedule
Inspect
Move
Mode
Tasks
Task
Summary
Milestone
Deliverable
Insert
Information
Notes
Details
Add to Timeline
Properties
Scroll to Task
Editing
CALENDAR
June 2015
July 2015
August 2015
Month
Week
Custom
July 2015
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Children's Gourmet Cookbook, 104 days
Manuscript received
Content edit, 25 days
Aug 1
READY
NEW TASKS : AUTO SCHEDULED

The Calendar view resembles a traditional "month-at-a-glance" calendar and displays tasks as bars spanning the days on which they are scheduled to occur.

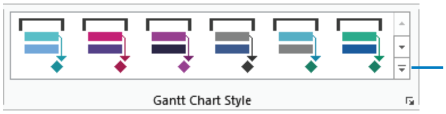
Next, you'll switch back to the Gantt Chart view.

8 On the **Task** tab, in the **View** group, click the image part of the **Gantt Chart** button.

TIP Throughout this book, when you see an instruction to click a command that has a graphic image as well as an arrow that displays more options, we mean to click the graphic image (unless otherwise noted).

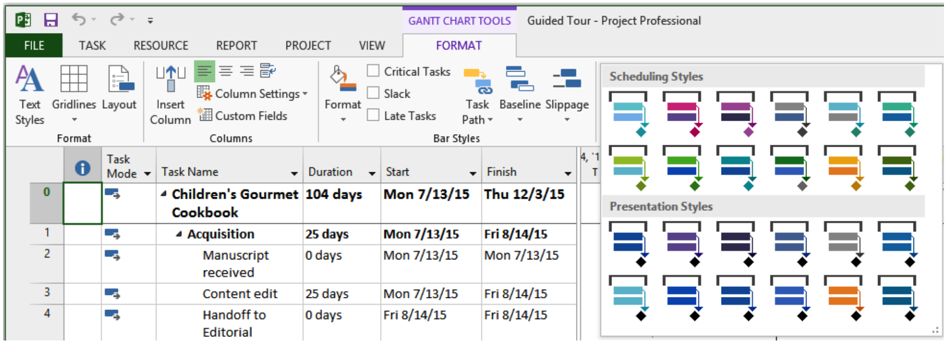
Next, you will examine other button types.

9 On the **Format** tab, in the **Gantt Chart Style** group, click the **More** button to display the predefined color styles.


Gantt Chart Style

The More button

A gallery of preformatted Gantt bar options appears.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Text Styles
Gridlines
Layout
Format
Insert Column
Column Settings
Custom Fields
Columns
Format
Critical Tasks
Slack
Late Tasks
Task Path
Baseline
Slippage
Bar Styles
Scheduling Styles
Presentation Styles

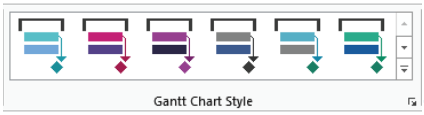
	Task Mode	Task Name	Duration	Start	Finish
0		**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1		**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2		Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3		Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4		Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15

You'll work with these options in Chapter 7.

10 Press the Esc key or click the **Format** tab to close the gallery.

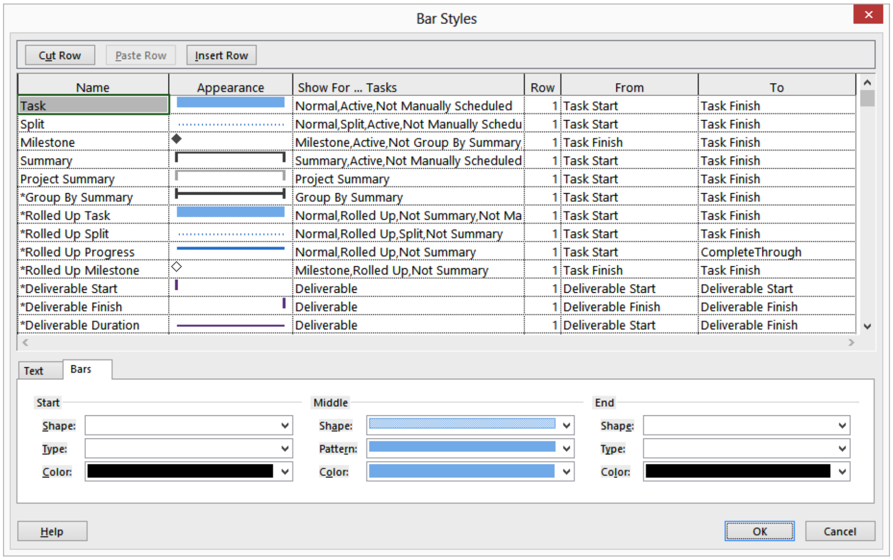
To see more Gantt bar formatting options, you'll next use a different type of button.

11 On the **Format** tab, in the **Gantt Chart Style** group, click the **Format Bar Styles** button in the lower-right corner of the group.


Gantt Chart Style

The Dialog box launcher button

The Bar Styles dialog box appears.


Bar Styles
Cut Row
Paste Row
Insert Row

Name	Appearance	Show For ... Tasks	Row	From	To
Task		Normal,Active,Not Manually Scheduled	1	Task Start	Task Finish
Split		Normal,Split,Active,Not Manually Schedu	1	Task Start	Task Finish
Milestone		Milestone,Active,Not Group By Summary	1	Task Finish	Task Finish
Summary		Summary,Active,Not Manually Scheduled	1	Task Start	Task Finish
Project Summary		Project Summary	1	Task Start	Task Finish
*Group By Summary		Group By Summary	1	Task Start	Task Finish
*Rolled Up Task		Normal,Rolled Up,Not Summary,Not Ma	1	Task Start	Task Finish
*Rolled Up Split		Normal,Rolled Up,Split,Not Summary	1	Task Start	Task Finish
*Rolled Up Progress		Normal,Rolled Up,Not Summary	1	Task Start	CompleteThrough
*Rolled Up Milestone		Milestone,Rolled Up,Not Summary	1	Task Finish	Task Finish
*Deliverable Start		Deliverable	1	Deliverable Start	Deliverable Start
*Deliverable Finish		Deliverable	1	Deliverable Finish	Deliverable Finish
*Deliverable Duration		Deliverable	1	Deliverable Start	Deliverable Finish

Text
Bars
Start
Shape:
Type:
Color:
Middle
Shape:
Pattern:
Color:
End
Shape:
Type:
Color:
Help
OK
Cancel

The Format Bar Styles button is an example of a *dialog box launcher*. Unlike the Assign Resources dialog box you saw earlier, you must close the Bar Styles dialog box before you can perform other actions outside of this dialog box.

12 Click **Cancel** to close the **Bar Styles** dialog box.

There are other ways of accessing commands in Project, but what you've seen in this exercise covers most command interfaces in Project.

TIP Keyboard shortcuts are supported throughout Project. To see the keyboard shortcuts for the available commands, press the Alt key. Other keyboard shortcuts, such as Project's multilevel undo (Ctrl+Z) are generally available at all times.

Next, you'll change the active view and other details you work with in Project.

Views: Working with schedule details the way you want

The working space in Project is called a ***view***. Project includes many types of views. Some examples of views include tables with graphics, tables with timescales, just tables, charts and diagrams, and forms. With some views, you can filter, sort, or group data, as well as customize what types of data is displayed. You can use and customize the views that come with Project as well as create your own.

Project contains dozens of views, but you normally work with just one view (or sometimes two) at a time. You use views to enter, edit, analyze, and display your project information. The default view—the one you see when you create a new plan—is the Gantt with Timeline view.

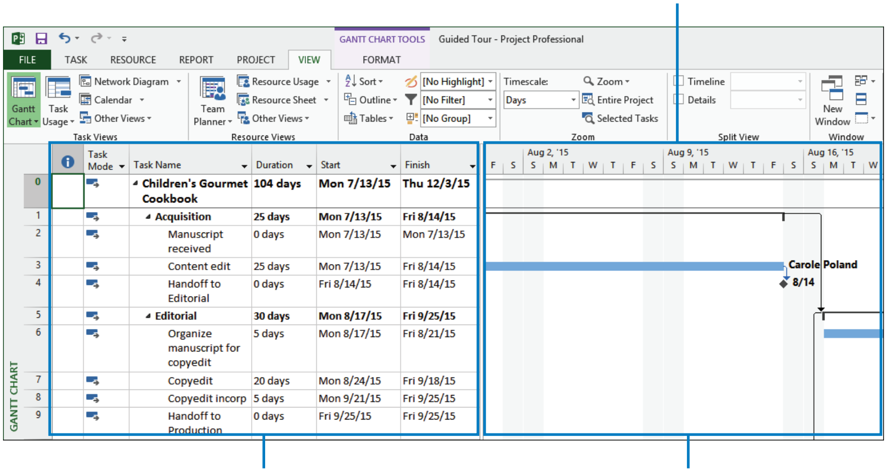
In general, views focus on task, resource, or ***assignment*** details. The Gantt Chart view, for example, lists task details in a table on the left side of the view and graphically represents each task as a bar in the chart on the right side of the view. The Gantt Chart view is a common way to represent a schedule. This type of view is also useful for entering and fine-tuning task details and for analyzing your project.

In this exercise, you'll start at the Gantt Chart view and then switch to other views that focus on different aspects of a plan.

1 On the **View** tab, in the **Zoom** group, click the down arrow next to the **Timescale** box and click **Days**.

Project adjusts the timescale to show individual days. Nonworking days, such as weekends, are formatted in light gray.

You can adjust the timescale to change how much of your plan is visible in the chart portion.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
FORMAT
Gantt Chart
Task Usage
Network Diagram
Calendar
Other Views
Task Views
Team Planner
Resource Usage
Resource Sheet
Other Views
Resource Views
Sort
Outline
Tables
[No Highlight]
[No Filter]
[No Group]
Data
Timescale:
Days
Zoom
Entire Project
Selected Tasks
Zoom
Timeline
Details
Split View
New Window
Window
GANTT CHART
Aug 2, '15
Aug 9, '15
Aug 16, '15
F S S M T W T F S S M T W T F S S M T W
Carole Poland
8/14

	Task Mode	Task Name	Duration	Start	Finish
0		**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1		**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2		Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3		Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4		Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5		**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6		Organize manuscript for copyedit	5 days	Mon 8/17/15	Fri 8/21/15
7		Copyedit	20 days	Mon 8/24/15	Fri 9/18/15
8		Copyedit incorp	5 days	Mon 9/21/15	Fri 9/25/15
9		Handoff to Production	0 days	Fri 9/25/15	Fri 9/25/15

A Gantt chart view includes this table portion...

...and this chart portion.

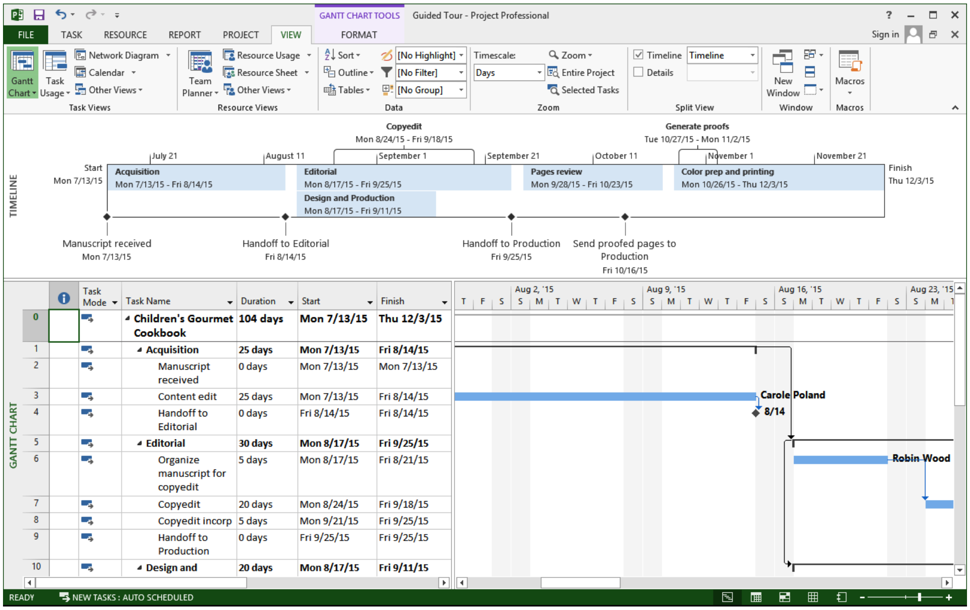
You can adjust the timescale in the Gantt Chart view in several ways. Here, you used the Timescale box on the View tab. You can also use the Zoom Slider in the lower-right corner of the status bar.

Next, you'll display a view that is a handy way of seeing the "big picture" of the plan.

2 On the **View** tab, in the **Split View** group, select the **Timeline** check box.

Project displays the Timeline view in the pane above the Gantt Chart view.

This Timeline view has been populated for you with some details from the plan. You'll create a custom Timeline view in Chapter 7.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
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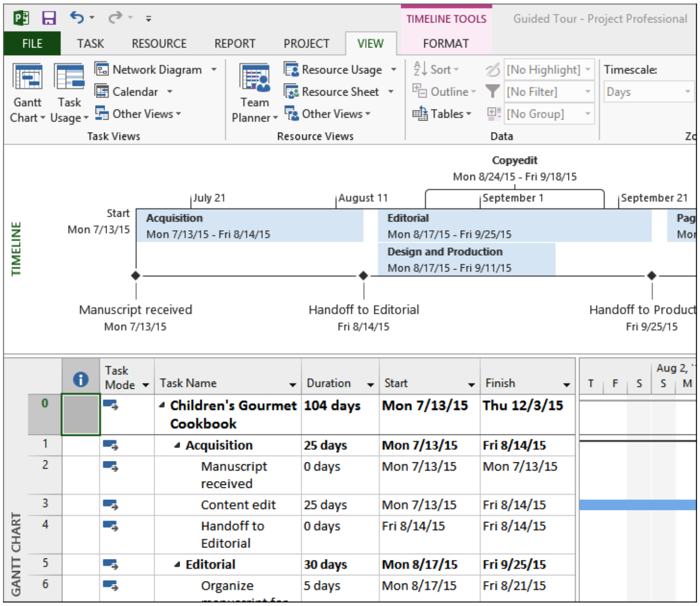
FORMAT
Sign in
Gantt Chart
Task Usage
Network Diagram
Calendar
Other Views
Task Views
Team Planner
Resource Usage
Resource Sheet
Other Views
Resource Views
Sort
Outline
Tables
[No Highlight]
[No Filter]
[No Group]
Data
Timescale:
Days
Zoom
Entire Project
Selected Tasks
Zoom
Timeline
Details
Split View
New Window
Window
Macros
Macros
TIMELINE
Copyedit
Mon 8/24/15 - Fri 9/18/15
Generate proofs
Tue 10/27/15 - Mon 11/2/15
July 21
August 11
September 1
September 21
October 11
November 1
November 21
Start
Mon 7/13/15
Acquisition
Mon 7/13/15 - Fri 8/14/15
Editorial
Mon 8/17/15 - Fri 9/25/15
Design and Production
Mon 8/17/15 - Fri 9/11/15
Pages review
Mon 9/28/15 - Fri 10/23/15
Color prep and printing
Mon 10/26/15 - Thu 12/3/15
Finish
Thu 12/3/15
Manuscript received
Mon 7/13/15
Handoff to Editorial
Fri 8/14/15
Handoff to Production
Fri 9/25/15
Send proofed pages to Production
Fri 10/16/15
GANTT CHART
Aug 2, '15
Aug 9, '15
Aug 16, '15
Aug 23, '15
T F S S M T W T F S S M T W T F S S M T W T F S S M T
Carole Poland
8/14
Robin Wood
READY
NEW TASKS : AUTO SCHEDULED

	Task Mode	Task Name	Duration	Start	Finish
0		**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1		**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2		Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3		Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4		Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5		**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6		Organize manuscript for copyedit	5 days	Mon 8/17/15	Fri 8/21/15
7		Copyedit	20 days	Mon 8/24/15	Fri 9/18/15
8		Copyedit incorp	5 days	Mon 9/21/15	Fri 9/25/15
9		Handoff to Production	0 days	Fri 9/25/15	Fri 9/25/15
10		**Design and**	**20 days**	**Mon 8/17/15**	**Fri 9/11/15**

3 Click anywhere in the **Timeline** view.

Note that the label above the Format tab changed to Timeline Tools. The commands displayed on the Format tab now are specific to the Timeline view. Throughout this exercise, as you see different views, note when the label above the Format tab changes accordingly.


TIMELINE TOOLS
Guided Tour - Project Professional
FILE
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Gantt Chart
Task Usage
Network Diagram
Calendar
Other Views
Task Views
Team Planner
Resource Usage
Resource Sheet
Other Views
Resource Views
Sort
Outline
Tables
[No Highlight]
[No Filter]
[No Group]
Data
Timescale:
Days
TIMELINE
Copyedit
Mon 8/24/15 - Fri 9/18/15
July 21
August 11
September 1
September 21
Start
Mon 7/13/15
Acquisition
Mon 7/13/15 - Fri 8/14/15
Editorial
Mon 8/17/15 - Fri 9/25/15
Design and Production
Mon 8/17/15 - Fri 9/11/15
Manuscript received
Mon 7/13/15
Handoff to Editorial
Fri 8/14/15
Fri 9/25/15
GANTT CHART
Aug 2,
T F S S M

	Task Mode	Task Name	Duration	Start	Finish
0		**Children's Gourmet Cookbook**	**104 days**	**Mon 7/13/15**	**Thu 12/3/15**
1		**Acquisition**	**25 days**	**Mon 7/13/15**	**Fri 8/14/15**
2		Manuscript received	0 days	Mon 7/13/15	Mon 7/13/15
3		Content edit	25 days	Mon 7/13/15	Fri 8/14/15
4		Handoff to Editorial	0 days	Fri 8/14/15	Fri 8/14/15
5		**Editorial**	**30 days**	**Mon 8/17/15**	**Fri 9/25/15**
6		Organize	5 days	Mon 8/17/15	Fri 8/21/15

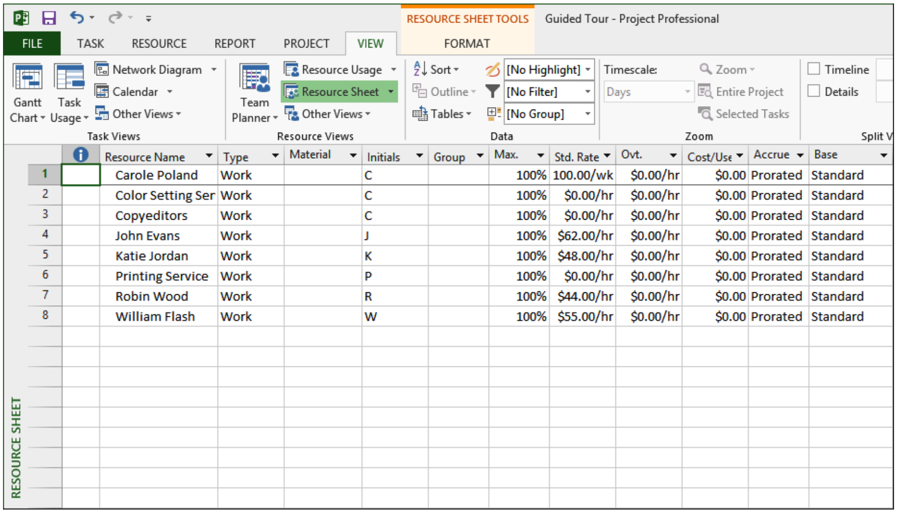
4 On the **View** tab, in the **Split View** group, clear the **Timeline** check box.

Project hides the Timeline view. (The information in the view is not lost; it's just hidden for now.)

Next, you'll switch to a sheet view.

5 On the **View** tab, in the **Resource Views** group, click **Resource Sheet**.

The Resource Sheet view replaces the Gantt Chart view.


RESOURCE SHEET TOOLS
Guided Tour - Project Professional
FILE
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Gantt Chart
Task Usage
Network Diagram
Calendar
Other Views
Task Views
Team Planner
Resource Usage
Resource Sheet
Other Views
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Data
Timescale:
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Zoom
Entire Project
Selected Tasks
Zoom
☐ Timeline
☐ Details
Split V
RESOURCE SHEET

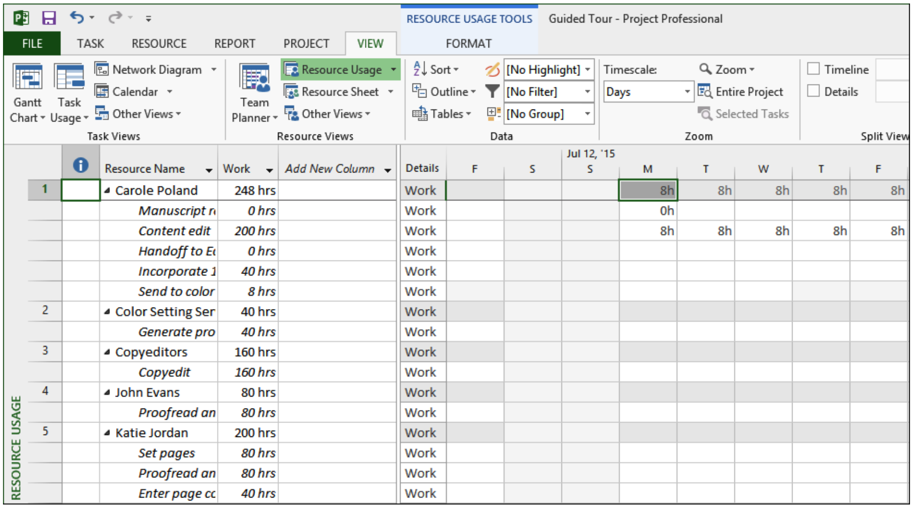
	ℹ	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt.	Cost/Use	Accrue	Base
1		Carole Poland	Work		C		100%	100.00/wk	$0.00/hr	$0.00	Prorated	Standard
2		Color Setting Ser	Work		C		100%	$0.00/hr	$0.00/hr	$0.00	Prorated	Standard
3		Copyeditors	Work		C		100%	$0.00/hr	$0.00/hr	$0.00	Prorated	Standard
4		John Evans	Work		J		100%	$62.00/hr	$0.00/hr	$0.00	Prorated	Standard
5		Katie Jordan	Work		K		100%	$48.00/hr	$0.00/hr	$0.00	Prorated	Standard
6		Printing Service	Work		P		100%	$0.00/hr	$0.00/hr	$0.00	Prorated	Standard
7		Robin Wood	Work		R		100%	$44.00/hr	$0.00/hr	$0.00	Prorated	Standard
8		William Flash	Work		W		100%	$55.00/hr	$0.00/hr	$0.00	Prorated	Standard

The Resource Sheet view displays details about resources in a row-and-column format (called a *table*), with one resource per row. This view is called a *sheet view*. Another sheet view, called the *Task Sheet view*, lists the task details. Also, notice that the label of the contextual tab has changed to Resource Sheet Tools based on the active view.

Note that the Resource Sheet view doesn't tell you anything about the tasks to which resources might be assigned. To see that type of information, you'll switch to a different view.

6 On the **View** tab, in the **Resource Views** group, click **Resource Usage**.

The Resource Usage view replaces the Resource Sheet view. This usage view groups the tasks to which each resource is assigned and shows you the work assignments per resource on a timescale, such as daily or weekly.


RESOURCE USAGE TOOLS
Guided Tour - Project Professional
FILE
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Task Usage
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Calendar
Other Views
Task Views
Team Planner
Resource Usage
Resource Sheet
Other Views
Resource Views
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Data
Timescale:
Days
Zoom
Entire Project
Selected Tasks
Zoom
☐ Timeline
☐ Details
Split View
RESOURCE USAGE

								Jul 12, '15					
	ⓘ	Resource Name	Work	Add New Column	Details	F	S	S	M	T	W	T	F
1		Carole Poland	248 hrs		Work				8h	8h	8h	8h	8h
		Manuscript r	*0 hrs*		Work				0h				
		Content edit	*200 hrs*		Work				8h	8h	8h	8h	8h
		Handoff to E	*0 hrs*		Work								
		Incorporate 1	*40 hrs*		Work								
		Send to color	*8 hrs*		Work								
2		Color Setting Ser	40 hrs		Work								
		Generate pro	*40 hrs*		Work								
3		Copyeditors	160 hrs		Work								
		Copyedit	*160 hrs*		Work								
4		John Evans	80 hrs		Work								
		Proofread an	*80 hrs*		Work								
5		Katie Jordan	200 hrs		Work								
		Set pages	*80 hrs*		Work								
		Proofread an	*80 hrs*		Work								
		Enter page cc	*40 hrs*		Work								

In the timescaled grid on the right side of the usage table, you can see some of Carole Poland's work assignments in the plan. Currently, this usage view's timeline shows assigned work per day. As with the Gantt Chart timescale, you can adjust this timescale using the Timescale command on the View tab or the Zoom Slider controls on the status bar in the lower-right corner of the Project window.

Another usage view, the Task Usage view, flips the data around to display all the resources assigned to each task. You'll work more with usage views in Chapter 9, "Advanced task scheduling."

7. On the **View** tab, in the **Task Views** group, click **Gantt Chart**.

   The Gantt Chart view appears.

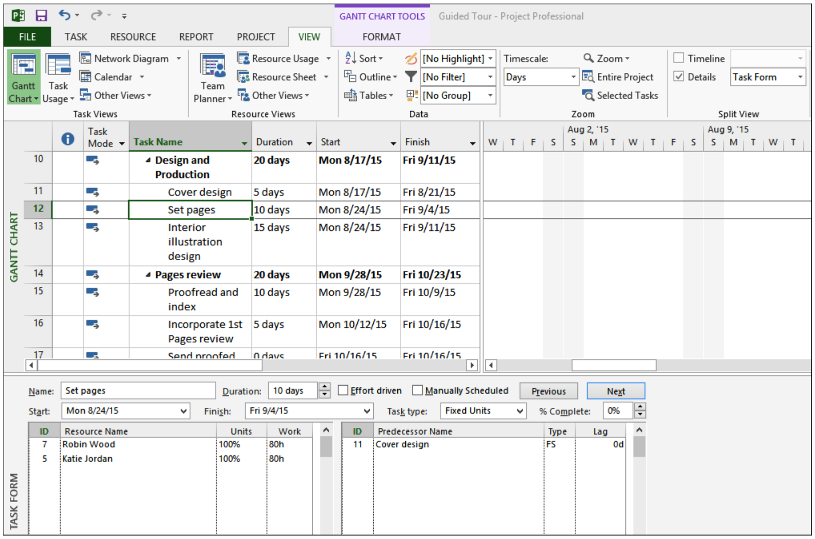
   To conclude this exercise, you'll display a different split view.

8. If necessary, vertically scroll the Gantt Chart view so that task 12 is near the top of the view.

9. In the **Task name** column, click the name of task 12, *Set pages*.

10. On the **View** tab, in the **Split View** group, click **Details**.

    The Task Form appears below the Gantt Chart view.


GANTT CHART TOOLS
Guided Tour - Project Professional
FILE
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Gantt Chart
Task Usage
Network Diagram
Calendar
Other Views
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Team Planner
Resource Usage
Resource Sheet
Other Views
Resource Views
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Timescale:
Days
Zoom
Entire Project
Selected Tasks
Zoom
☐ Timeline
☑ Details
Task Form
Split View
GANTT CHART
Aug 2, '15
Aug 9, '15
W T F S S M T W T F S S M T W T
TASK FORM

	Task Mode	Task Name	Duration	Start	Finish
10		**Design and Production**	**20 days**	**Mon 8/17/15**	**Fri 9/11/15**
11		Cover design	5 days	Mon 8/17/15	Fri 8/21/15
12		Set pages	10 days	Mon 8/24/15	Fri 9/4/15
13		Interior illustration design	15 days	Mon 8/24/15	Fri 9/11/15
14		**Pages review**	**20 days**	**Mon 9/28/15**	**Fri 10/23/15**
15		Proofread and index	10 days	Mon 9/28/15	Fri 10/9/15
16		Incorporate 1st Pages review	5 days	Mon 10/12/15	Fri 10/16/15
17		Send proofed	0 days	Fri 10/16/15	Fri 10/16/15

Name: Set pages
Duration: 10 days
☐ Effort driven
☐ Manually Scheduled
Previous
Next
Start: Mon 8/24/15
Finish: Fri 9/4/15
Task type: Fixed Units
% Complete: 0%

ID	Resource Name	Units	Work
7	Robin Wood	100%	80h
5	Katie Jordan	100%	80h

ID	Predecessor Name	Type	Lag
11	Cover design	FS	0d

In this type of split view, the Gantt Chart is the primary view and the Task Form is the details pane. Details about the selected task in the Gantt Chart view appear in the Task Form. You can also edit values directly in the Task Form. You will work with the Task Form in Chapter 6, "Assigning resources to tasks," and with the similar Resource Form in Chapter 5, "Setting up resources."

11 On the **View** tab, in the **Split View** group, clear the **Details** check box.

The Task Form is hidden.

There are many other views in Project. You can see them by clicking the Other Views command and then clicking More Views in the Task Views or Resource Views group on the View tab. Keep in mind that, in all these views as well as all the other views in Project, you are looking at different aspects of the same set of details about a plan. Even a simple plan can contain too much data to display at one time. Use views to help you focus on the specific details you want.

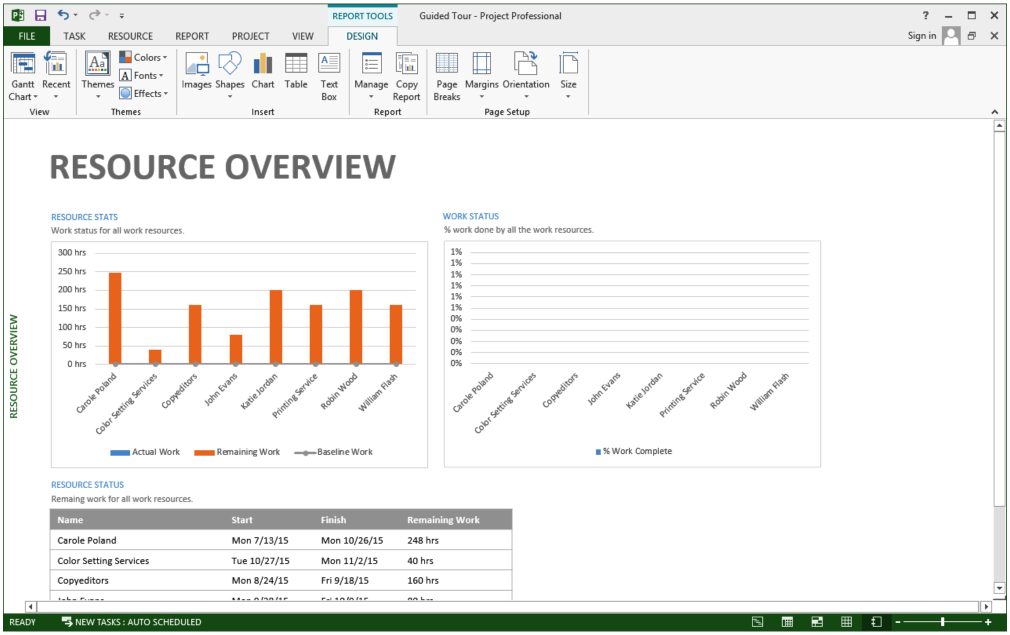
Reports: Seeing project status in new ways

Previous editions of Project supported tabular reports that were primarily designed for printing. In Project 2013, ***reports*** have been greatly enhanced, enabling you to convey your plan's data in compelling new formats. Reports now include elements such as charts, tables, and images to communicate the status of your plan, and they are highly customizable. You can print or view reports directly in the Project window just like any view. You can also copy reports and paste them into other applications such as Microsoft PowerPoint.

In this exercise, you will explore a report.

1 On the **Report** tab, in the **View Reports** group, click **Resources** and then click **Resource Overview**.

The Resource Overview report appears.


REPORT TOOLS
Guided Tour - Project Professional
FILE
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VIEW
DESIGN
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Recent
Themes
Colors
Fonts
Effects
Images
Shapes
Chart
Table
Text Box
Manage
Copy Report
Page Breaks
Margins
Orientation
Size
View
Themes
Insert
Report
Page Setup
RESOURCE OVERVIEW
300 hrs
250 hrs
200 hrs
150 hrs
100 hrs
50 hrs
0 hrs
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
Actual Work
Remaining Work
Baseline Work
1%
1%
1%
1%
1%
1%
0%
0%
0%
0%
0%
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
% Work Complete
READY
NEW TASKS : AUTO SCHEDULED

RESOURCE OVERVIEW

RESOURCE STATS

Work status for all work resources.

WORK STATUS

% work done by all the work resources.

RESOURCE STATUS

Remaing work for all work resources.

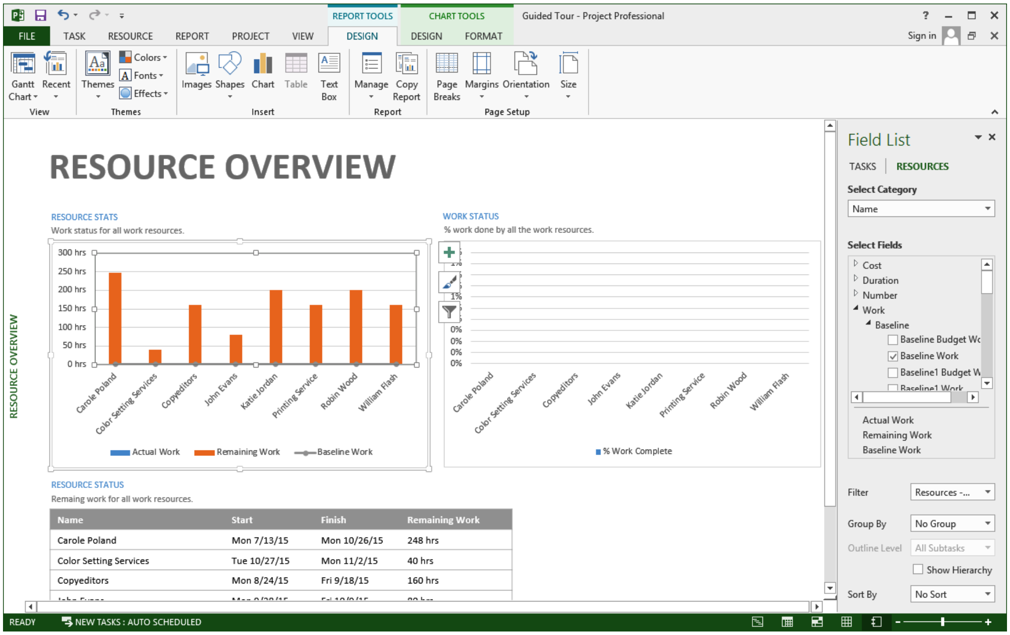
Name	Start	Finish	Remaining Work
Carole Poland	Mon 7/13/15	Mon 10/26/15	248 hrs
Color Setting Services	Tue 10/27/15	Mon 11/2/15	40 hrs
Copyeditors	Mon 8/24/15	Fri 9/18/15	160 hrs

2 Vertically scroll to see all of the report's content.

As you can see, this report includes two charts and a table.

3 Click the *Resource Stats* chart.

You see a couple of things happen when you do this.


REPORT TOOLS
CHART TOOLS
Guided Tour - Project Professional
FILE
TASK
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REPORT
PROJECT
VIEW
DESIGN
DESIGN
FORMAT
Sign in
Gantt Chart
Recent
Themes
Colors
Fonts
Effects
Images
Shapes
Chart
Table
Text Box
Manage
Copy Report
Page Breaks
Margins
Orientation
Size
View
Themes
Insert
Report
Page Setup
RESOURCE OVERVIEW
300 hrs
250 hrs
200 hrs
150 hrs
100 hrs
50 hrs
0 hrs
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
Actual Work
Remaining Work
Baseline Work
1%
0%
0%
0%
0%
% Work Complete
Field List
TASKS
RESOURCES
Select Category
Select Fields
Cost
Duration
Number
Work
Baseline
Baseline Budget Wo
Baseline Work
Baseline1 Budget W
Baseline1 Work
Actual Work
Remaining Work
Baseline Work
Show Hierarchy
READY
NEW TASKS : AUTO SCHEDULED

RESOURCE OVERVIEW

RESOURCE STATS

Work status for all work resources.

WORK STATUS

% work done by all the work resources.

RESOURCE STATUS

Remaing work for all work resources.

Name	Start	Finish	Remaining Work
Carole Poland	Mon 7/13/15	Mon 10/26/15	248 hrs
Color Setting Services	Tue 10/27/15	Mon 11/2/15	40 hrs
Copyeditors	Mon 8/24/15	Fri 9/18/15	160 hrs

Select Category: Name

☐ Baseline Budget Wo

☑ Baseline Work

☐ Baseline1 Budget W

☐ Baseline1 Work

Filter: Resources -...

Group By: No Group

Outline Level: All Subtasks

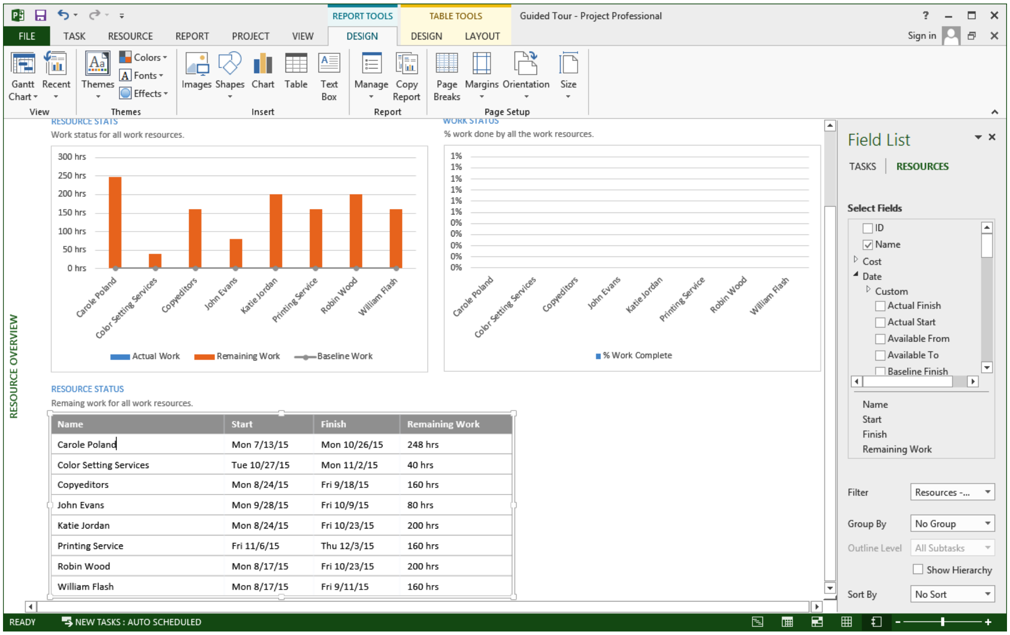
☐ Show Hierarchy

Sort By: No Sort

First, the Field List pane appears on the right side of the window. You use this pane to determine what data to include in the chart. You will customize reports in Chapter 7 and in Chapter 18, "Advanced report formatting."

The second thing that happened is that the Report Tools and Chart Tools and their related contextual tabs appeared on the ribbon.

4 Click the *Resource Status* table.


REPORT TOOLS
TABLE TOOLS
Guided Tour - Project Professional
? – ☐ ✕
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
DESIGN
DESIGN
LAYOUT
Sign in
Gantt Chart
Recent
View
Themes
Colors
Fonts
Effects
Themes
Images
Shapes
Chart
Table
Text Box
Insert
Manage
Copy Report
Report
Page Breaks
Margins
Orientation
Size
Page Setup
RESOURCE OVERVIEW
300 hrs
250 hrs
200 hrs
150 hrs
100 hrs
50 hrs
0 hrs
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
Actual Work
Remaining Work
Baseline Work
1%
1%
1%
1%
1%
1%
0%
0%
0%
0%
0%
0%
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
% Work Complete
Field List
TASKS
RESOURCES
READY
NEW TASKS : AUTO SCHEDULED

RESOURCE STATS

Work status for all work resources.

WORK STATUS

% work done by all the work resources.

RESOURCE STATUS

Remaing work for all work resources.

Name	Start	Finish	Remaining Work
Carole Poland	Mon 7/13/15	Mon 10/26/15	248 hrs
Color Setting Services	Tue 10/27/15	Mon 11/2/15	40 hrs
Copyeditors	Mon 8/24/15	Fri 9/18/15	160 hrs
John Evans	Mon 9/28/15	Fri 10/9/15	80 hrs
Katie Jordan	Mon 8/24/15	Fri 10/23/15	200 hrs
Printing Service	Fri 11/6/15	Thu 12/3/15	160 hrs
Robin Wood	Mon 8/17/15	Fri 10/23/15	200 hrs
William Flash	Mon 8/17/15	Fri 9/11/15	160 hrs

Select Fields

☐ ID
☑ Name
Cost
Date
  Custom
  ☐ Actual Finish
  ☐ Actual Start
  ☐ Available From
  ☐ Available To
  ☐ Baseline Finish

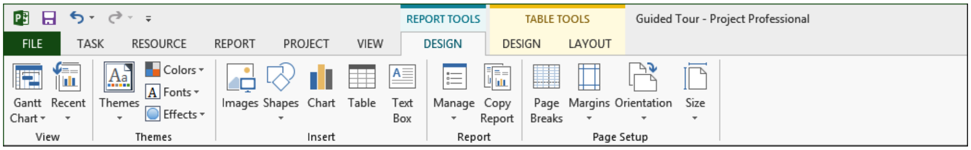
Name
Start
Finish
Remaining Work

Filter: Resources -...
Group By: No Group
Outline Level: All Subtasks
☐ Show Hierarchy
Sort By: No Sort

Again, you see the Field List pane and the contextual tabs update to reflect that you now have a table selected in the report rather than a chart.

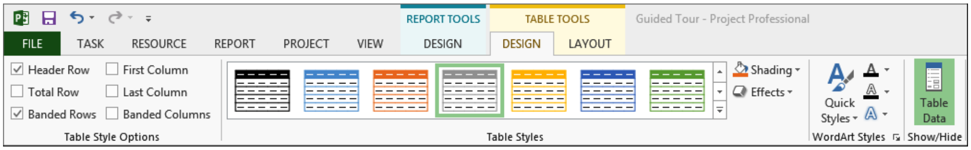
Next, you will explore the contextual tabs.

5 Under **Report Tools**, click the **Design** tab.


REPORT TOOLS
TABLE TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
DESIGN
DESIGN
LAYOUT
Gantt Chart
Recent
View
Themes
Colors
Fonts
Effects
Themes
Images
Shapes
Chart
Table
Text Box
Insert
Manage
Copy Report
Report
Page Breaks
Margins
Orientation
Size
Page Setup

Here you can see commands that relate to the overall design of the report.

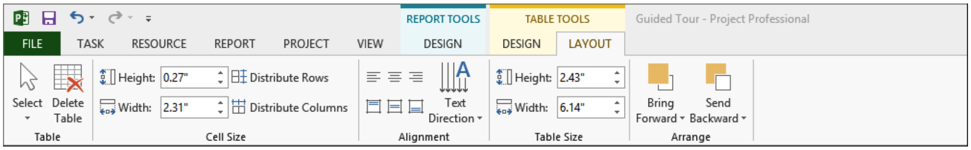
6 Under **Table Tools**, click the **Design** tab.


REPORT TOOLS
TABLE TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
DESIGN
DESIGN
LAYOUT
Table Style Options
Table Styles
Shading
Effects
Quick Styles
WordArt Styles
Table Data
Show/Hide

☑ Header Row ☐ First Column
☐ Total Row ☐ Last Column
☑ Banded Rows ☐ Banded Columns

Now you see commands that apply to the selected table in this report.

7 Under **Table Tools**, click the **Layout** tab.

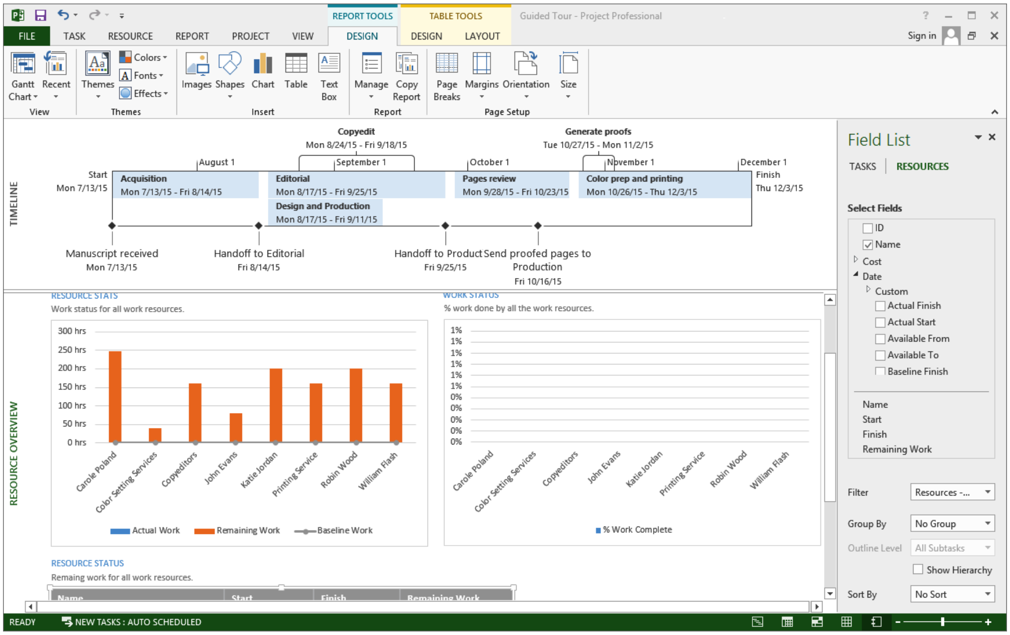


REPORT TOOLS
TABLE TOOLS
Guided Tour - Project Professional
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
DESIGN
DESIGN
LAYOUT
Select
Delete Table
Height: 0.27"
Width: 2.31"
Distribute Rows
Distribute Columns
Text Direction
Height: 2.43"
Width: 6.14"
Bring Forward
Send Backward
Table
Cell Size
Alignment
Table Size
Arrange

You can use these commands to control the overall layout of the selected table.

Next, we will split the window to display both a view and a report at the same time.

8 On the **View** tab in the **Split View** group, click **Timeline**.



REPORT TOOLS
TABLE TOOLS
Guided Tour - Project Professional
Sign in
FILE
TASK
RESOURCE
REPORT
PROJECT
VIEW
DESIGN
DESIGN
LAYOUT
Gantt Chart
Recent
Themes
Colors
Fonts
Effects
Images
Shapes
Chart
Table
Text Box
Manage
Copy Report
Page Breaks
Margins
Orientation
Size
View
Themes
Insert
Report
Page Setup
TIMELINE
Copyedit
Mon 8/24/15 - Fri 9/18/15
Generate proofs
Tue 10/27/15 - Mon 11/2/15
August 1
September 1
October 1
November 1
December 1
Start
Mon 7/13/15
Acquisition
Mon 7/13/15 - Fri 8/14/15
Editorial
Mon 8/17/15 - Fri 9/25/15
Design and Production
Mon 8/17/15 - Fri 9/11/15
Pages review
Mon 9/28/15 - Fri 10/23/15
Color prep and printing
Mon 10/26/15 - Thu 12/3/15
Finish
Thu 12/3/15
Manuscript received
Mon 7/13/15
Handoff to Editorial
Fri 8/14/15
Handoff to Production
Fri 9/25/15
Send proofed pages to Production
Fri 10/16/15
RESOURCE OVERVIEW
RESOURCE STATS
Work status for all work resources.
300 hrs
250 hrs
200 hrs
150 hrs
100 hrs
50 hrs
0 hrs
Carole Poland
Color Setting Services
Copyeditors
John Evans
Katie Jordan
Printing Service
Robin Wood
William Flash
Actual Work
Remaining Work
Baseline Work
WORK STATUS
% work done by all the work resources.
1%
1%
1%
1%
1%
1%
0%
0%
0%
0%
0%
% Work Complete
RESOURCE STATUS
Remaing work for all work resources.
Name
Start
Finish
Remaining Work
Field List
TASKS
RESOURCES
Select Fields
☐ ID
☑ Name
Cost
Date
Custom
☐ Actual Finish
☐ Actual Start
☐ Available From
☐ Available To
☐ Baseline Finish
Name
Start
Finish
Remaining Work
Filter
Resources -...
Group By
No Group
Outline Level
All Subtasks
☐ Show Hierarchy
Sort By
No Sort
READY
NEW TASKS : AUTO SCHEDULED

This split view includes a top-level summary in the Timeline view and an overview of your resources in the Resource Overview report.

TIP To see additional information about using reports, on the Report tab, in the View Reports Group, click Getting Started and then click any of the commands listed.

✖ CLEAN UP **Close the Guided Tour file.**

Key points

- The Backstage view is the central location for managing files and customizing Project.
- The ribbon includes several tabs. On each tab, commands are grouped for quick access.
- The main working space in Project is a view. One view (or sometimes two views) is typically displayed at a time. The Gantt with Timeline view is the default; the Gantt Chart is probably the best-known view in Project, and the Gantt chart is a well-known visual representation in project management as a whole.
- Reports include a variety of elements, such as charts and tables to help convey schedule details in compelling formats.

Simple Scheduling Basics

3 Starting a new plan 40

4 Building a task list 52

5 Setting up resources 82

6 Assigning resources to tasks 102

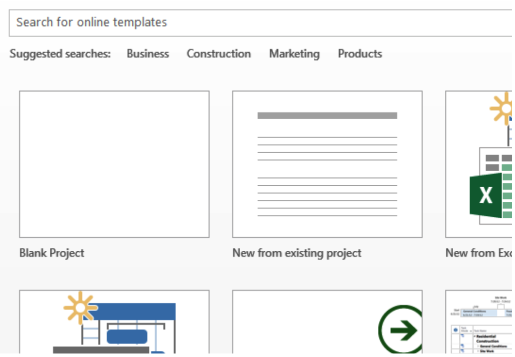
7 Formatting and sharing your plan 124

8 Tracking progress 150

Chapter at a glance

Create

Create a new plan, page 42.



Search for online templates

Suggested searches: Business Construction Marketing Products

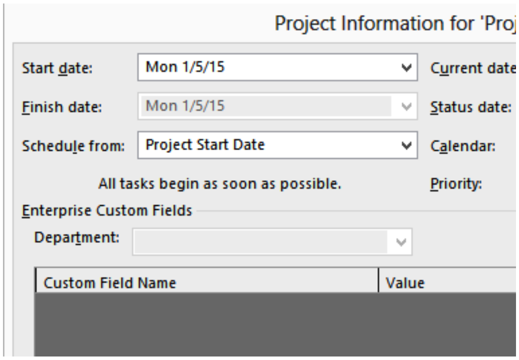
Blank Project

New from existing project

New from Exc

Start

Set the new plan's start date, page 43.



Project Information for 'Proj

Start date: Mon 1/5/15

Current date

Finish date: Mon 1/5/15

Status date:

Schedule from: Project Start Date

Calendar:

All tasks begin as soon as possible.

Priority:

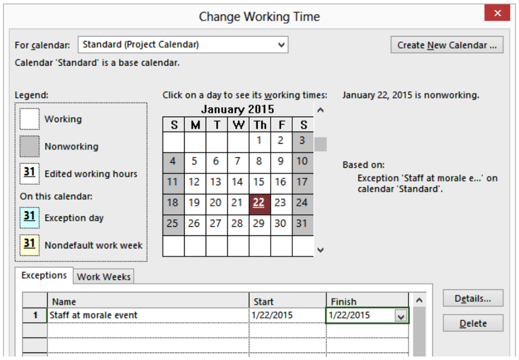
Enterprise Custom Fields

Department:

Custom Field Name	Value

Holiday

Set working-time exceptions in the project calendar, page 45.



Change Working Time

For calendar: Standard (Project Calendar)

Create New Calendar ...

Calendar 'Standard' is a base calendar.

Legend:

- Working
- Nonworking
- 31 Edited working hours

On this calendar:

- 31 Exception day
- 31 Nondefault work week

Click on a day to see its working times:

January 2015

S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

January 22, 2015 is nonworking.

Based on:
Exception 'Staff at morale e...' on calendar 'Standard'.

Exceptions | Work Weeks

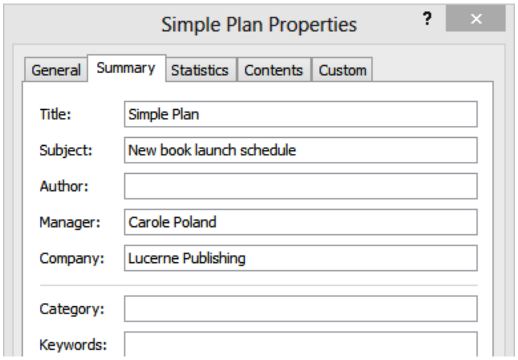
	Name	Start	Finish
1	Staff at morale event	1/22/2015	1/22/2015

Details...

Delete

Detail

Enter properties like the plan's title, page 48.



Simple Plan Properties

General | Summary | Statistics | Contents | Custom

Title: Simple Plan

Subject: New book launch schedule

Author:

Manager: Carole Poland

Company: Lucerne Publishing

Category:

Keywords:

Starting a new plan

3

IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Start a new plan, set its start date, and save it.
- Review the available base calendars, and then create a working-time exception in the project calendar.
- Enter some properties about the plan.

A project's schedule or plan is essentially a model that you construct of some aspects of a project you are anticipating—what you think will happen, or what you want to happen. This model focuses on some, but not all, aspects of a project—tasks, resources, time frames, and possibly their associated costs. Note that throughout this book, we'll refer to the types of documents that Microsoft Project 2013 works with as ***plans***, not documents or schedules.

PRACTICE FILES Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. A complete list of practice files is provided in "Download the practice files" at the beginning of this book. For each exercise that has a practice file, simply browse to where you saved the book's practice file folder.

IMPORTANT If you are running Project Professional with Project Web App/Project Server, take care not to save any of the practice files you work with in this book to Project Web App (PWA). For more information, see Appendix C, "Collaborating: Project, SharePoint, and PWA."

Starting a new plan, and setting its start date

As you might expect, Project focuses primarily on time. Sometimes you might know the planned start date of a project, the planned finish date, or both. However, when working with Project, you specify only one date, not both: the project start date or the project finish date. Why? Because after you enter the project start or finish date and other project details, Project calculates the other date for you. Remember that Project is not just merely a static repository of your schedule information or a Gantt chart drawing tool—it is an active scheduling engine.

Most plans should be scheduled from a start date, even if you know that the project should finish by a certain deadline date. Scheduling from a start date causes all tasks to start as soon as possible, and it gives you the greatest scheduling flexibility. In this and later chapters, you will see this flexibility in action as you work with a project that is scheduled from a start date.

Now that you've had a brief look at the major parts of the Project interface in Part 1, "Introduction to Microsoft Project," you are ready to create the plan you will use throughout Part 2 of this book, "Simple scheduling basics."

The scenario: Throughout this book, you'll play the role of a project manager at Lucerne Publishing, a book publisher that specializes in children's books. Lucerne is about to publish a major new book, and you've been asked to develop a plan for the book launch.

In this exercise, you create a new plan, set its start date, and save it.

➔ SET UP **You don't need practice files to complete this exercise; just follow the steps.**

1. Do one of the following:
   - In Project, if you see the **File** tab, click it, and then click **New**.
   - If you already see a list of available templates in the Start screen, continue to the next step.

   Project displays your options for creating a new plan. These options include using templates installed with Project or that are available on the web. You see this same list of templates in the Start screen when you start Project, and in the New screen on the File tab.