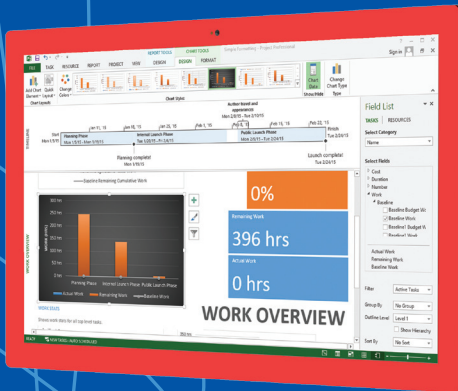


# Step by Step



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

# Microsoft Project 2013

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Step by Step

**Carl Chatfield**  
**Timothy Johnson**

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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 9: Advanced task scheduling	Advanced Tasks_Start.mpp
Chapter 10: Fine-tuning task details	Fine Tuning Tasks_Start.mpp

Chapter	File
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.

<b>This setting</b>	<b>Should be</b>
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

## Your companion ebook

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.

## Get support and give feedback

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:

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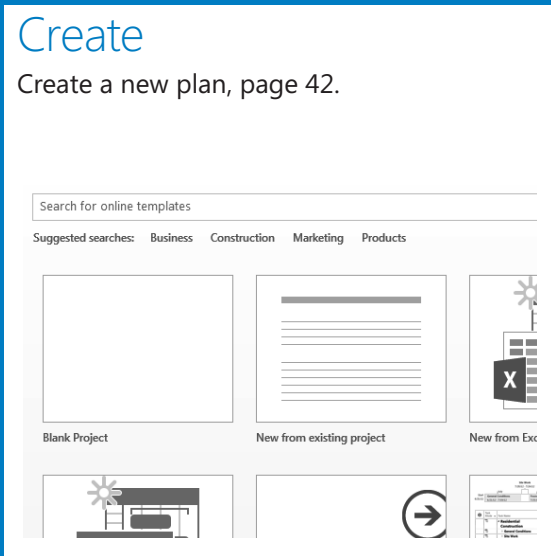




# Chapter at a glance

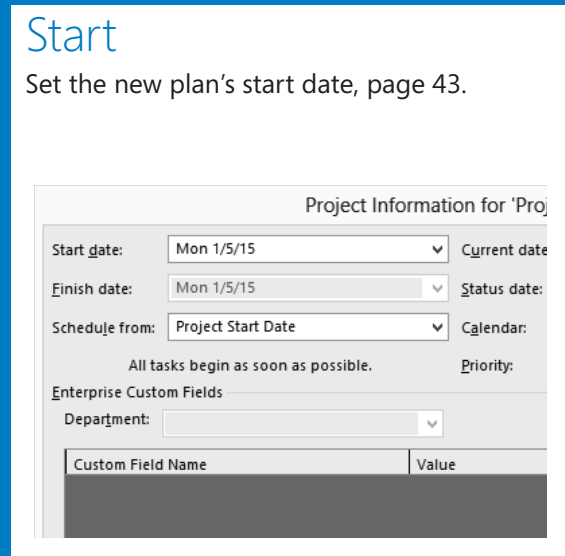
## Create

Create a new plan, page 42.



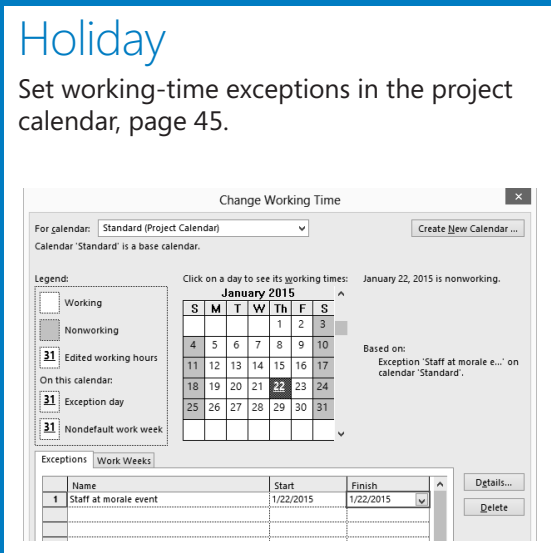
## Start

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



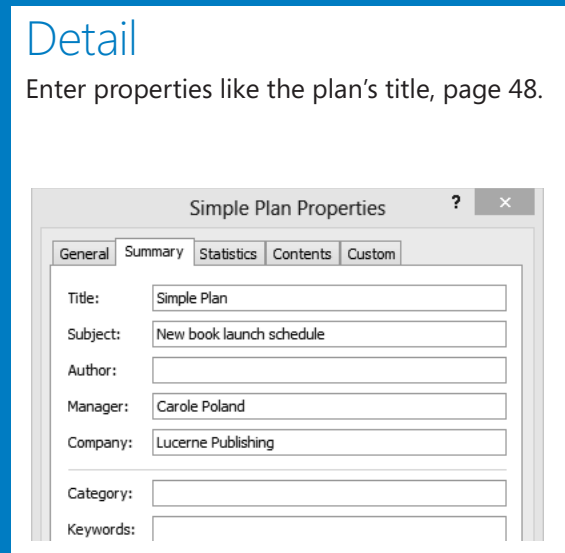
## Holiday

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



## Detail

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



# 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.



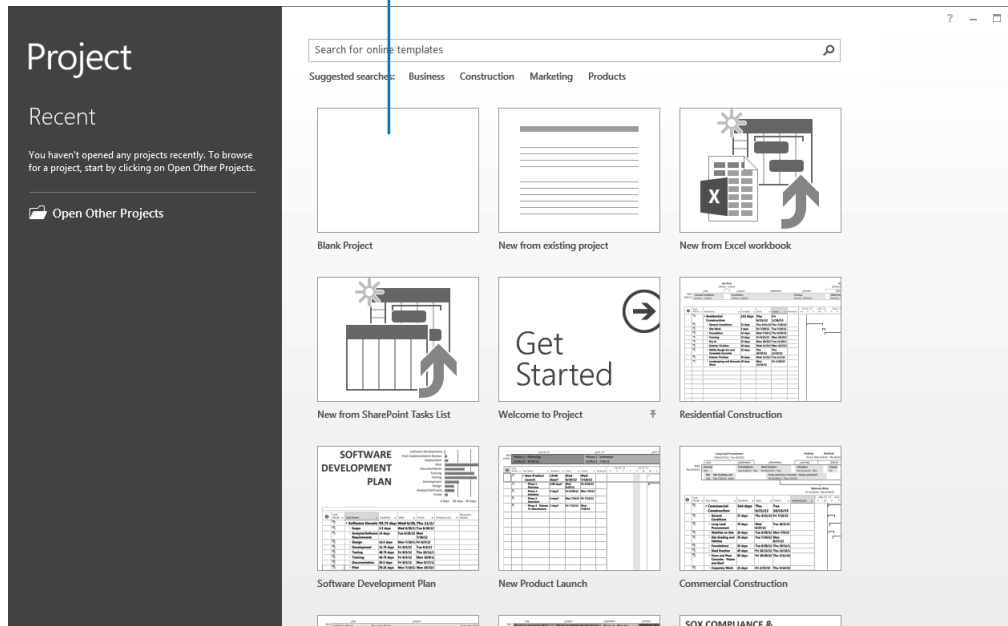
**SET UP** You don't need practice files to complete this exercise; just follow the steps.

- 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.

For this exercise, you will create a new blank plan.

To create a new plan, click here.



3

- 2 In the list of available templates, click **Blank Project**.

Project creates a new plan. You might see a status bar message at the bottom of the window reminding you that new tasks are created in the *manually scheduled* mode. This information remains visible on the status bar.

Notice the thin green vertical line in the chart portion of the Gantt Chart view. This indicates the current date. When you create a new plan, Project sets the plan's start date to the current date. Next you'll change the plan's start date.

- 3 On the **Project** tab, in the **Properties** group, click **Project Information**.

The Project Information dialog box appears.

**IMPORTANT** If you are using Project Professional rather than Project Standard, the Project Information dialog box and some other dialog boxes contain additional options relating to Project Server. Throughout this book, we won't use Project Server, so you can ignore these options. For more information about Project Server, see Appendix C, "Collaborating: Project, SharePoint, and PWA."

- 4 In the **Start Date** box, type **1/5/15**, or click the down arrow to display the calendar and select January 5, 2015.

**TIP** In the calendar, you can use the left and right arrows to navigate to any month and then click the date you want, or click Today to quickly choose the current date.

Project Information for 'Project1'

Start date: Mon 1/5/15 Current date: Mon 11/10/14

Finish date: Mon 1/5/15 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Enterprise Custom Fields

Department: [dropdown]

Custom Field Name	Value
-------------------	-------

Help Statistics... OK Cancel

Project Standard users do not see this portion of the dialog box.

Note in the Schedule From drop-down list the *Project Start Date* value. As noted previously, because this plan is scheduled from the start date, you enter the start date and Project calculates the finish date based on the schedule details contained in the plan.

- 5 Click **OK** to accept this start date and close the Project Information dialog box.

Project scrolls the chart portion of the Gantt Chart view to show the project start date. The start date is shown as a thin dashed vertical line.

**TIP** You can set Project to automatically display the Project Information dialog box each time you create a new plan. To make this change, on the File tab click Options. In the Project Options dialog box, click the Advanced tab, and then under General, select Prompt For Project Info For New Projects.

- 6 On the **File** tab, click **Save**.  
Because this plan has not been previously saved, the Save As screen appears.
- 7 Under **Save and Sync**, click **Computer**, and then click **Browse**.
- 8 Locate the Chapter03 folder in the Project 2013 Step by Step folder on your hard disk.
- 9 In the **File name** box, type **Simple Plan**.
- 10 Click **Save** to save the plan and close the Save As dialog box.

**TIP** You can instruct Project to automatically save the active plan at predefined intervals, such as every 10 minutes. On the File tab, click Options. In the Project Options dialog box, click Save, select the Auto Save Every check box, and then specify the time interval you want.

## Setting nonworking days in the project calendar

3

Calendars are the primary means by which you control when each task and resource can be scheduled for work in Project. In later chapters, you will work with other types of calendars; in this chapter, you work only with the project calendar.

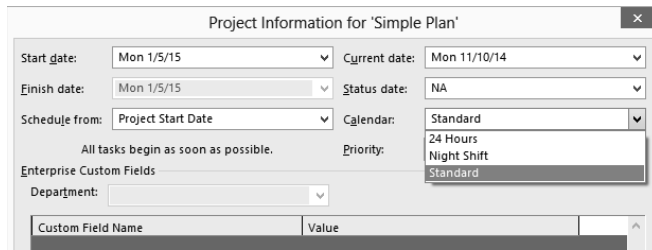
The *project calendar* defines the general working and nonworking days and time for tasks. Project includes multiple calendars, called *base calendars*, any one of which can serve as the project calendar for a plan. You select the base calendar that will be used as the project calendar in the Project Information dialog box. Think of the project calendar as your organization's normal working hours. For example, this might be Monday through Fridays, 8 A.M. through 5 P.M., with a one-hour lunch break each day. Your organization or specific resources might have exceptions to this normal working time, such as holidays or vacation days. You'll address resource vacations in Chapter 5, "Setting up resources."

You manage calendars through the Change Working Time dialog box (accessed on the Project tab). Use this dialog box to set normal working schedules and working-time exceptions for individual resources or, as you'll do here, the entire plan.

The scenario: At Lucerne Publishing, you need to account for an upcoming date on which the entire Lucerne staff will be unavailable to work on the book launch project.

In this exercise, you'll review the available base calendars and then create a working-time exception in the project calendar:

- 1 On the **Project** tab, in the **Properties** group, click **Project Information**.  
The Project Information dialog box appears.
- 2 In the **Calendar** box, click the down arrow.



The list that appears contains the three base calendars included with Project:

- **24 Hours** Has no nonworking time
- **Night Shift** Covers a “graveyard” shift schedule of Monday night through Saturday morning, 11 P.M. to 8 A.M., with a one-hour break each day
- **Standard** The traditional working day and week, Monday through Friday from 8 A.M. to 5 P.M., with a one-hour break each day

Only one of the base calendars serves as the project calendar. For this project, you’ll use the Standard base calendar as the project calendar, so leave it selected.

3 Click **Cancel** to close the Project Information dialog box without making any changes.

You know the entire Lucerne staff will be at a morale event on January 22; therefore, no work should be scheduled that day. You will record this as a calendar exception.

4 On the **Project** tab, in the **Properties** group, click **Change Working Time**.

The Change Working Time dialog box appears.

5 In the **Name** field on the **Exceptions** tab in the lower portion of the dialog box, type **Staff at morale event**, and then click in the **Start** field.

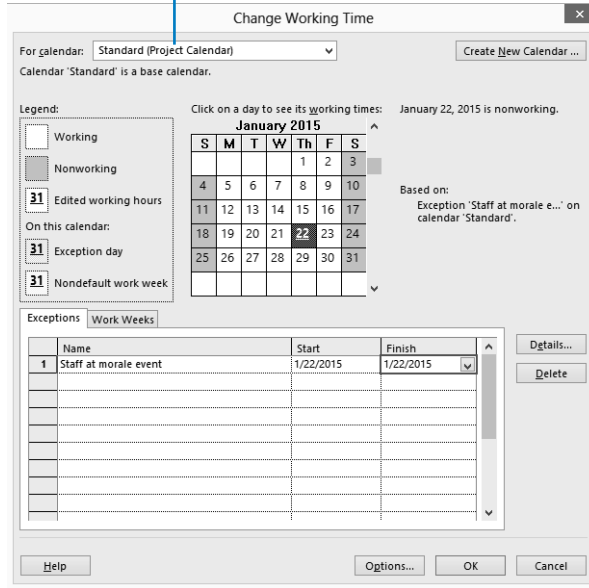
**TIP** You don’t need to name calendar exceptions, but it’s a good practice for you or others to identify the reason for the exception.

6 In the **Start** field, type **1/22/15**, and then click the **Finish** field or press the Right Arrow key.

**TIP** You can also select the date you want in the calendar above the Exceptions tab or from the drop-down calendar in the Start field.



Here you can see that the Standard base calendar is designated as the Project Calendar.



The date is now scheduled as nonworking time for the project. In the dialog box, the date appears underlined and color formatting is applied to indicate an exception day.

7 Click **OK** to close the Change Working Time dialog box.

To verify the change to the project calendar, note in the chart portion of the Gantt Chart view that Thursday, January 22, is now formatted as gray to indicate nonworking time (just like the weekends).

In this section, you made just one specific day a nonworking day for the entire plan. Other common examples of working time adjustments include:

- Recurring holidays or other times off that follow a known pattern, such as weekly, monthly, or annually. To set up recurring nonworking times, click the Details button on the Exceptions tab in the Change Working Time dialog box.
- Vary working times per week, for example, to address seasonal changes in working times. To set up custom work weeks, on the Work Weeks tab of the Change Working Time dialog box, enter the date range you want, click the Details button, and then set the working time adjustments you want.
- Unique working hours for a resource. You'll make such settings in Chapter 5.

# Entering the plan's title and other properties

Like other Microsoft Office applications, Project keeps track of several file properties. Some of these properties are statistics, such as how many times the file has been revised. Other properties include information that you might want to record about a plan, such as the project title, the project manager's name, or keywords to support a file search. Some of these properties are used in views, in reports and in page headers and footers when printing. You can see and record these properties in the Advanced Properties dialog box.

The scenario: At Lucerne Publishing, you want to record top-level information about the new book launch plan. These details won't affect the overall schedule but relate to important supplemental information you want to keep in the plan.

In this exercise, you enter some properties about the plan that you will use later when printing and for other purposes:

- 1 Click the **File** tab.  
The Backstage view appears. The Info tab should be selected by default. On the right side of the screen, under Product Information, note the key statistics, such as the start date on the right side of the Backstage view. Notice that many of the fields you see here are the same fields you see in the Project Information dialog box. You can edit these fields in either place.
- 2 Click **Project Information**. In the menu that appears, click **Advanced Properties**.  
The Properties dialog box appears with the Summary tab visible.
- 3 In the **Subject** box, type **New book launch schedule**.
- 4 In the **Manager** box, type **Carole Poland**.
- 5 In the **Company** box, type **Lucerne Publishing**.
- 6 In the **Comments** box, type **New children's book for spring release**.

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:

Comments: New children's book for spring release

Hyperlink base:

Template:

Save preview picture

OK Cancel

- 7 Click **OK** to close the dialog box.  
To conclude this exercise, you will save the Simple Tasks file, and then close it.
- 8 On the **File** tab click **Save**.

## Project management focus: Project is part of a larger picture

Depending on your needs and the information to which you have access, the plans that you develop might not deal with other important aspects of your projects. For example, many large projects are undertaken in organizations that have a formal change-management process. Before a major change to the scope of a project is allowed, it must be evaluated and approved by the people managing and implementing the project. Even though this is an important project-management activity, it is not something done directly within Project.



**CLEAN UP** Close the Simple Plan file.

# Key points

- Scheduling a plan from a start date (as opposed to a finish date) gives you the most flexibility.
- You use calendars in Project to control when work can be scheduled to occur.
- You should record file properties in a plan for later use when printing views and reports.





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