Contents

Chapter 1 **Overview of Project Management** **1**

Chapter 2 **Overview of Microsoft Project** **3**
Benefits of Scheduling Software 4
Overview of Project as a Database 6
Project Usage 9
Formulate a Strategy 10
Success Checklist 11
Project Desktop 2013 Overview of Versions 12
Review of the Ribbon, Back Stage View, Quick Launch 14
Exploring the Ribbon 14
Backstage View (File Tab) 16
Overview of Common Views 18
Task Views 18
Resource Views 21
Popular View Adjustments and Navigation 24
Zooming In and Out 24
Hide or Insert a Column 25
Using the Scroll to Task Button 28
Go To and Find 28
Keyboard Shortcuts 30
Help 34

Chapter 3 **Start a Project** **35**
Creating New Projects 36
How to Start a New Project Schedule 37
Saving a project 38
How to Save a New Project 39
Save or Save As, Share and Export 39
Opening a Project 43
How to Open a Project 44
Creating a New Project 44
Creating a Project from an Excel Workbook 47
Creating a Project from a SharePoint Task List 49
Saving the Schedule 50

©2013 Advisicon, Inc.

Save As 51
Share & Export 52
Calendar Overview 53
How Calendars Work in Project 2013? 53
Setting Working Hours and Days 56
Setting Non-Working Hours and Days 59
Setting Calendar Options 64
Saving the Calendar 65
Project Information 67
Options 69
General vs Per Project Options 69
Scheduling Options 74
Definitions 74
Effort-driven scheduling 75
Understanding Task Types 75
Scheduling Options 77

Chapter 4 Task Development 81
Creating the Work Breakdown Structure 82
Overview of Work Breakdown Structure 82
Guidelines for Creating a WBS 107
Milestones 110
Manual vs Automatic 112
Traditional or automatic scheduling 112
Manual scheduling 112
When to Use Manual vs. Automatic Scheduling 113
Project Live Cycle Approach 115
Change to Auto Schedule 116

Chapter 5 Estimating, Linking and Lead and Lag 119
Overview of Estimating 120
How Project 2013 Defines and Calculates Work and Duration 120
Estimating Techniques 120
What to Estimate? 121
Where Do the Estimates Come From? 121
How Do You Get Good Estimates? 122
Entering Estimates 123
Estimating for Unknown Resources 125
Add Elaspsed Time 126
Duration, Work, or Duration & Work 126

©2013 Advisicon, Inc.

Types of Durations 126
Concept of the Scheduling Engine 127
Linking 128
Task Dependency Types 128
Best Practices for Using Dependencies 132
Lead & Lag 137
What is Lag Time? 137
What is Lead Time? 139
Best Practices 141
Inactivate Tasks 143

Chapter 6 Constraints and Deadlines 145
Constraints 146
What are Constraints? 146
Constraint Types 147
Avoiding Accidental Constraints 150
Effects of Constraints 153
Deadlines 155
Task Deadlines 155
Split Tasks 159
Splitting Tasks 159
Task Calendar 163
Applying Task Calendars 163
Move Project 165
Moving the Entire Project Timeline 165
Task Notes 168
Adding Notes to Tasks 168

Chapter 7 Resources 171
Work, Material, Cost: Resource Types 172
Work Resources 172
Cost Resources 173
Material Resources 174
Resource Sheet 175
Calendar 180
Material Resources 184
Cost Resource: Lite 185

Chapter 8 Work Assignments 187
What is an Assignment? 188

©2013 Advisicon, Inc.

Review of Task Types and Effort-Driven Scheduling 188
Task Type Scenarios 190
Scenario 1: Entering a Constant Duration Value 190
Scenario 2: Entering a Constant Work Value 191
Techniques to Assign Resources 193
Assignments Using the Resource Names Column 193
Assignments Using Task Information 194
Assignments Using the Assign Resources Dialog Box 194
Assignments Using Task Entry View 195
Fixed Work Assignments 196
Fixed Duration Assignments 198
Fixed Unit Assignments 202

Chapter 9 **Fine Tune the Project Schedule 209**
Applying Groups and Filters to Views 210
How to Apply a Group 210
How to Apply a Column-Based Group 211
How to Remove a Group 211
How to Apply a Filter 211
How to Apply an AutoFilter 212
How to Apply a Highlight Filter 212
How to Remove All Filters 212
What are Groups? 213
Built-in Groups 214
Built-in Filters 216
Sorting Tasks or Resources in a View 220
How to Sort Information 221
How to Apply a Column Based Sort 221
How to Reset a Sort Back to Default 222
Critical Path 223
What is a Critical Path 223
Formatting Views to Display Critical Path 225
Viewing Resource Assignments 226
Resource Usage View 226
Task Usage View 227
How to Display Resource Usage View 227
How to Display Task Usage View 227
How to Adjust Information in the TimePhased Grid on Resource Usage or Task Usage View 228
Team Planner View 228

©2013 Advisicon, Inc.

How to Display Team Planner View 229
Understanding Overallocations 232
Real World Application of Scheduling: Shortening the Schedule and Resolving Resource Conflicts 233
Shortening the Schedule 233
Resolving Resource Conflicts 234
Views to Identify Overallocations 235
Using Indicators 235
Using the Resource Allocation View 236
How to Display Resource Allocation View 237
Methods for Resolving Resource Conflicts 238
Using Indicator Suggestions 238
Using Task Inspector 239
How to Apply Task Inspector 240
Changing Resource Assignments 242
Move a Task Until a Resource is Available 242
How to Move Tasks to Account for Resource Limitations 243
Assigning a Work Contour 243
Using the Team Planner View 244
Applying Leveling Features 245

Chapter 10 Baseline and Tracking 251
The Importance of Baselining 252
Setting a Baseline 253
Clearing a Baseline 255
Updating Baseline 256
Overview of Tracking 258
Tracking Activities With Project 259

Chapter 11 Printing and Reporting 267
Printing 268
Print Settings 268
Page Setup: Header, Footer, Note Print Option 275
Define Page Setup 275
Copy Picture 280
Save as PDF 283
Send as an Attachment 285
Gantt Charts: Timescale, Turn Off Legend, Show the Format Ribbon 286
Using the Format Tab 286
Formatting Text Styles 287

©2013 Advisicon, Inc.

Formatting the Gantt Chart 289
Reporting 297
Visual Reports 297
Dashboard Reports 306
Timeline View Report 308

©2013 Advisicon, Inc.