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## Chapter 4

# **Start a Project**

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## Creating New Projects

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One of the very first things you need to do to create a project is to choose an approach.

There are several methods to select from when creating a new schedule using Microsoft Project 2013. You may start a project schedule with a blank template or use an existing template. If you have a task list started in Excel, Outlook, Word and SharePoint, these task lists may be added to a new project schedule. Below are listed some of the suggested methods for initiating a new project schedule.

- Blank – clean schedule
- New From Existing – copy from existing schedule
- New From Excel – importing information from Excel
- New From SharePoint Tasks List – shortcut to bring SharePoint tasks into your schedule
- Get Started Wizard – guided approach with visuals to help individuals feel more comfortable working in a schedule
- Template – public or private pre-built schedules that can be used as examples



If you do not have Internet access, you may not have all of these choices. Many templates are available from the Microsoft site and are not included with the software when installed.



Office 365 or cloud users may have different choices depending on their organization's configuration.



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## How to Start a New Project Schedule

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1. Click the File tab
2. Click **New**
3. Click the desired item from the previews
4. If needed, click **Create** to obtain a copy of that item to start your schedule



Templates available are simply examples and may not map to your organization's project management practices. Be sure to review the templates for modifications that you might need to make.

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## **Saving a project**

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Saving a project is all about storing a project for quick and easy retrieval. You may choose to store your project on your computer, on a network location, or on a cloud storage solution. As each organization's configuration is different, we will focus on the procedures for saving to your local computer.

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## How to Save a New Project

---

1. Click the **File** tab
2. Click **Save** or **Save As**
3. Click **Computer**
4. Click **Browse**
5. Navigate to the desired folder
6. Enter the desired name for the schedule
7. Click **Save**



The folder you just used will be available under Recent Folders to simplify this process for future new projects.



When making changes to the same project, you can use the Save icon on the Quick Access Toolbar as a fast method to ensure your project changes are being captured.

# Save or Save As, Share and Export

---

## Save As

Table 4.1 PLACEHOLDER

Share Option	Feature
Sync with Sharepoint Site	Save file to an existing Sharepoint site
Email	Will send the currently opened MS Project file as an attachment in an email

Table 4.2 PLACEHOLDER

Export	Feature
Create PDF/XPS Document	Using the current view a PDF of the view will be created and saved to disk

Table 4.2 PLACEHOLDER

Export	Feature
Save Project as File	<p>This feature will allow for:</p> <ul style="list-style-type: none"><li>• Saving into earlier version formats of MS Project files</li><li>• Saving templates</li><li>• Saving data to Excel, XML or another type format. This option will also start the MS Project Export Wizard where data for exporting maybe selected.</li></ul>

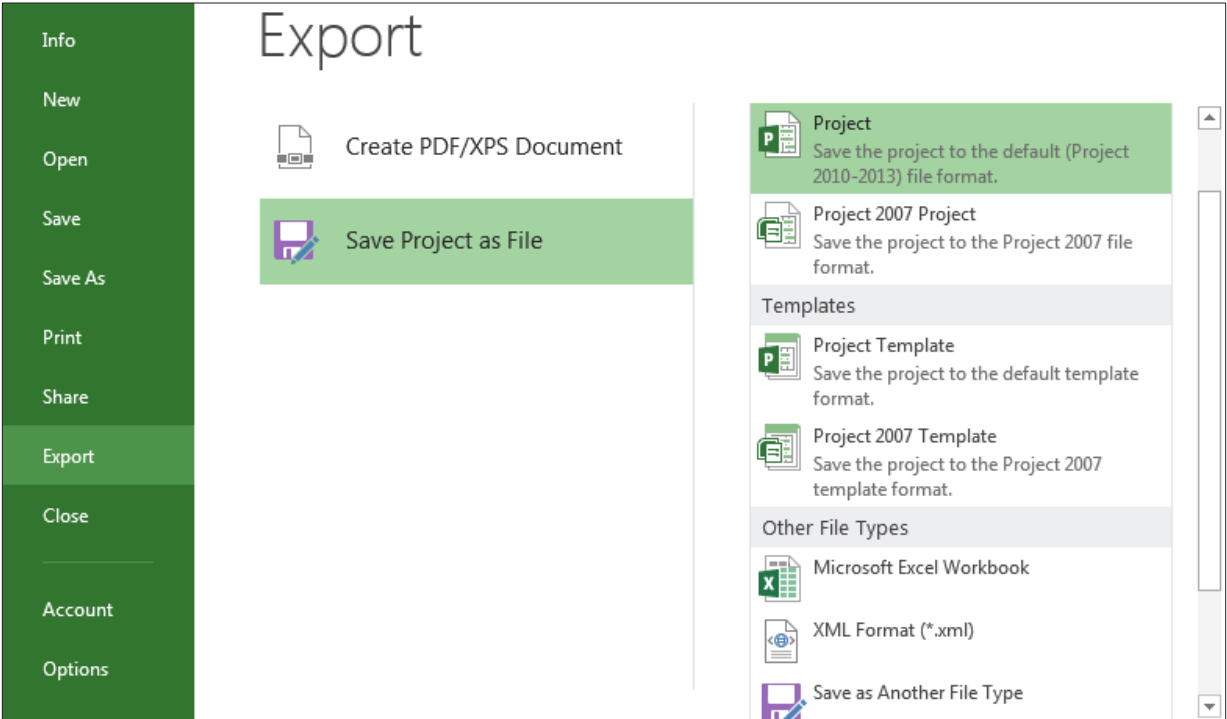


Figure 4-1 Export Project screenshot

To email the current open file as an attachment in an email:

- Click on File → Share → Email → Send as Attachment

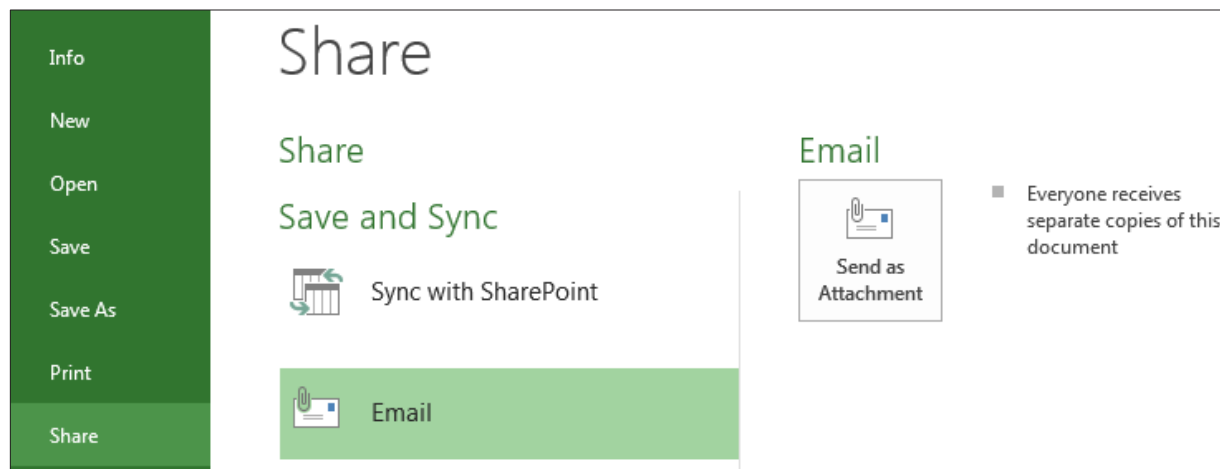


Figure 4-2 Share Email screenshot

ms Outlook will open with the file as an attachment. Select the email address, complete the email information and click **Send**.

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## Opening a Project

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Since opening projects is such a frequent task, you should take advantage of quick methods to do this. The following steps will help you optimize your environment for speedy retrieval of projects.

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## How to Open a Project

---

1. Click the **File** tab
2. Click **Open**
3. Click **Computer**
4. Click **Browse**
5. Navigate to the desired folder
6. Select the name for the schedule
7. Click **Open**



Click Recent Projects to quickly retrieve a project you have previously opened.



Pin a project to the top of the recent project list if you anticipate you will be using it on a regular basis.



Adding the Open button to the Quick Launch bar will save time.

---

## Creating a New Project



When Project 2013 is initiated, a new blank project schedule will automatically appear.

To create a blank project schedule:

- Click **File → New**

Backstage choices shown below will give you an array of choices of where to begin a new project schedule. As you click the various choices, options and additional data will appear on the right side of the view.

- Double clicking **Blank project** or click **Blank project** and click **Create** will result in creating a blank project file
- **Recent Templates:** Create a project from a recently used template



- **My templates:** Template created by you and saved to your desktop
- **New from an existing project:** Use an existing project schedule to create a new project
- **New project from Excel workbook:** Columns in the Excel workbook will be mapped to fields within Project 2013. The import process is discussed in the next lesson.
- **New from Sharepoint task list:** Project 2013 Professional only. Tasks will be imported using the URL and security of the Sharepoint site.
- **Office.com templates:** Create a new project from a template that would be downloaded from Office.com on-line



If the Quick Access Bar was customized to add the New button, pressing that button will create a new project schedule

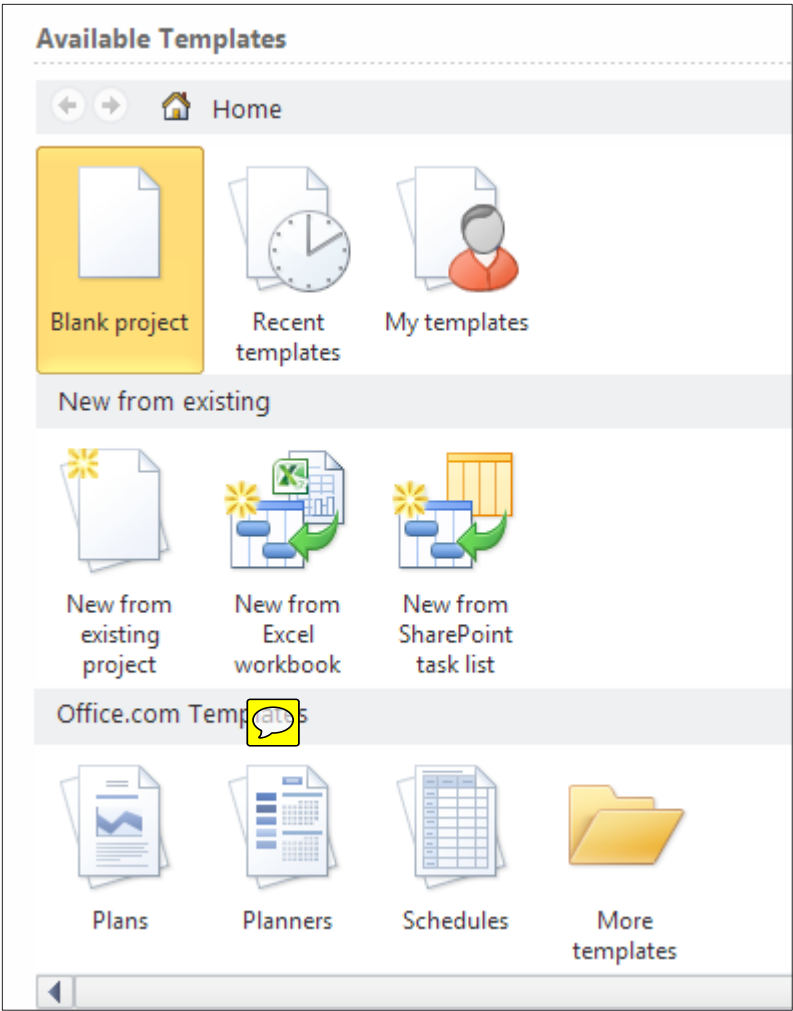


Figure 4-3   Creating a new project.

## Creating a Project from an Excel Workbook

---

A project schedule can be created using an Excel Workbook task list. Keep in mind that the fields or columns that are being imported from Excel will be mapped to fields or columns within Project 2013. Pre-planning to know which Excel fields should be mapped to which Project 2013 fields would be helpful.

To create a project schedule from an Excel Workbook:

1. Click **File** → **New** → **New From Excel Workbook**
2. Navigate to the Excel file that contains the tasks to be imported into the schedule, click **Open**
3. Project 2013 Import Wizard will start running – Click **Next**
4. Select whether to use a new map that will be created or an existing Project import map. For this example we will create a new map. Click the radio button next the **New Map** and click **Next**
5. Import can start a new project file, append to the end of an existing project file or merge the data using a merge field. In this example we will create a new project schedule. Click **As a new project** and click **Next**.
6. When the data is brought into Project 2013, select if the data is to be mapped to the Task fields, Resource fields or Assignment fields. Click **Tasks**.
7. If the originating Excel file contains header or title information, click **Import includes Headers**. The system will remove this row (the first line only) as the header row. Click **Next**
8. The Task Mapping form will be used to view some of the data and map which Excel fields will be imported into which Project 2013 fields. Pull down the values in the **Select worksheet name** option and select the sheet name in Excel that contains the data to be imported. After the choice has been made, the data from the sheet will be available for viewing.
9. In the example below, the duration field from the Excel Workbook was able to be automatically mapped to the duration field in Project 2013. However, the Task Name field could not find a match. The correct field name for the task name field in Project 2013 is “Name”. Click the red error message (**not mapped**) and select the field name of **Name**.

Repeat for other fields to be imported. Not all fields are required during the import process which allows the user to pick and choose which ones are appropriate to the schedule. Click **Next** to continue after all columns have been mapped.

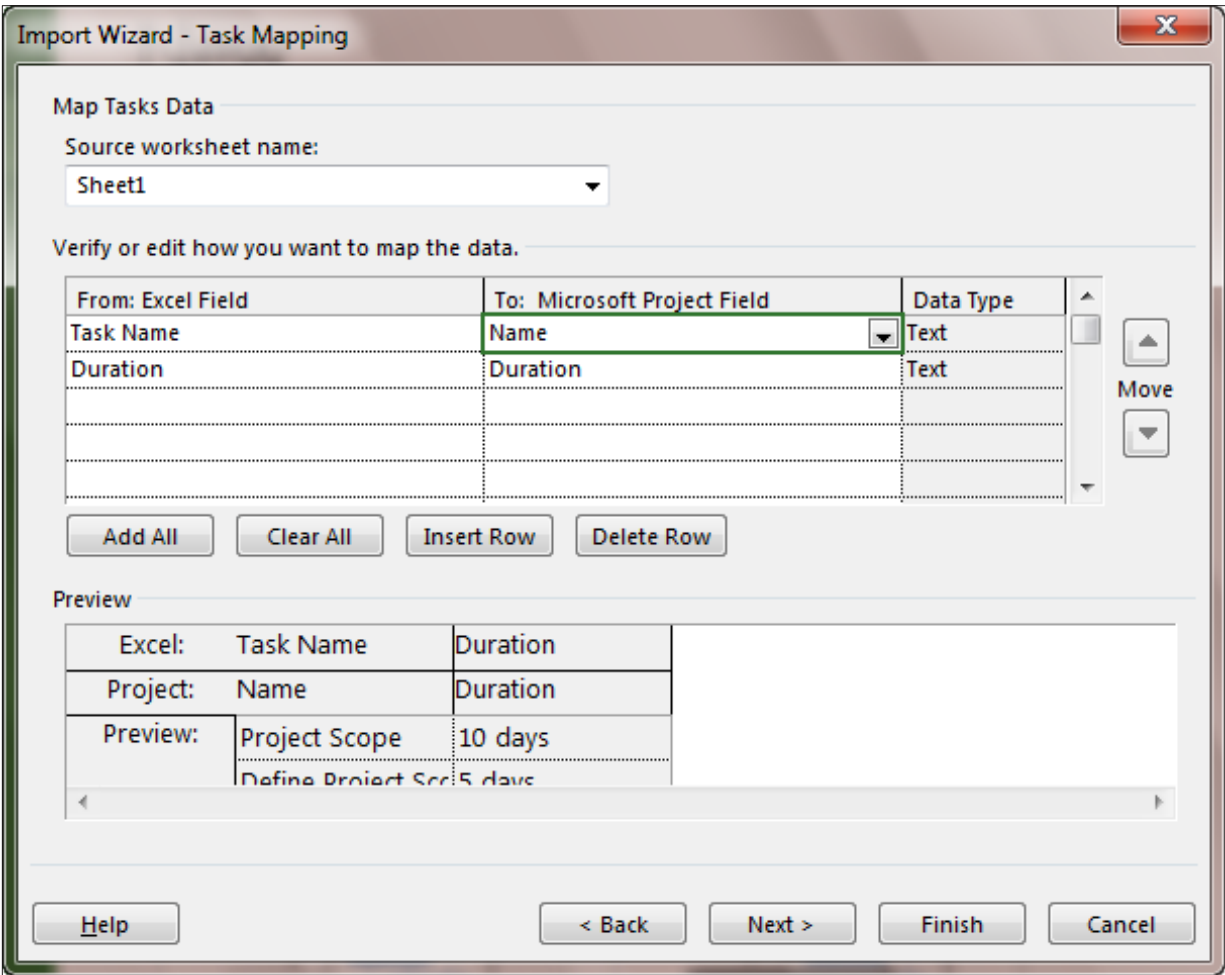


Figure 4-4 Creating a project from an Excel spreadsheet

- 10. The next step offers the option to save the map for future reuse.
  - a. To skip saving the map, click **Next**.
  - b. To save the map, click **Save Map** and give the map a name.Click **Finish** to start the import.
- 11. The new Project 2013 schedule will open with the columns imported.

## Creating a Project from a SharePoint Task List

Project 2013 Professional allows for creating a new project by importing a task list from a SharePoint site. The user must have appropriate permissions to access the SharePoint site and the URL path to insert into the form directing Project 2013 Pro to the location of the task list.

To import tasks from a SharePoint task list into Project 2013 Professional:

1. Click **File** → **New** → **New from SharePoint Task List**

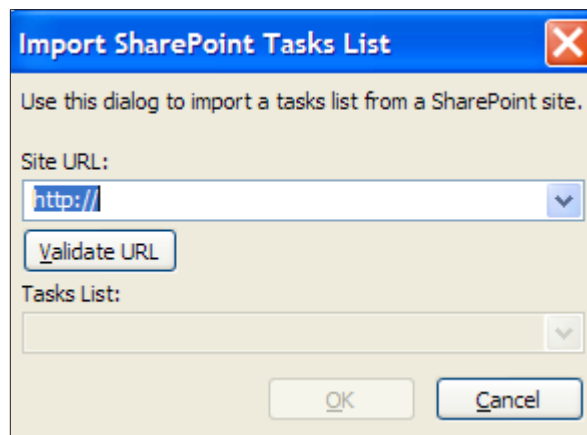


Figure 4-5 **PLACEHOLDER**

2. Enter the URL in the form as shown above and click **Change to Check Address**. A list of all the task lists included in the SharePoint site will be displayed. Select the appropriate list and click **OK**.

The list will be imported from the SharePoint site.



This feature is available in ms Project 2013 Professional version only.

## Saving the Schedule

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Project 2013 provides multiple file formats for a project schedule. The steps to save a file are very similar to other ms Office files.

To save the Project 2013 schedule:

1. Click **File** → **Save as** → **select file location**
2. Enter the file name in the File Name area
3. Click **Save** to complete the save. The file will be given a Project 2013 default file extension of .mpp

There is also an option to save the Project 2013 schedule in an alternative file format. Some of the formats are:

- ms Project 2007
- ms Project 2000-2003
- ms Project template 2013 - .mpt file extension
- ms Project template 2007 - .mpt file extension
- ms Excel
- PDF Files (.pdf)
- xps Files (\*.xps)
- XML Format (\*.xml)
- csv (Comma delimited) (\*.csv)
- Text (Tab Delimited) (.txt)
- Excel Workbook (.xlsx)
- Excel Binary Workbook (\*.xlsb)
- Excel 97-2003 (.xls)

## Save As

---

The Save As view, located in the backstage area in Project 2013, has been enhanced and provides more functionality for the user. From the backstage view these options are an easy method of saving projects to disk as well as sharing projects schedules with others users. Options have been added to sync a project with a Sharepoint site and to save a project to a Skydrive site.

To navigate to the options available for Save As:

- Click **File** → **Save As** → **select one of the options offered**



The right side of the screen will change as options are selected

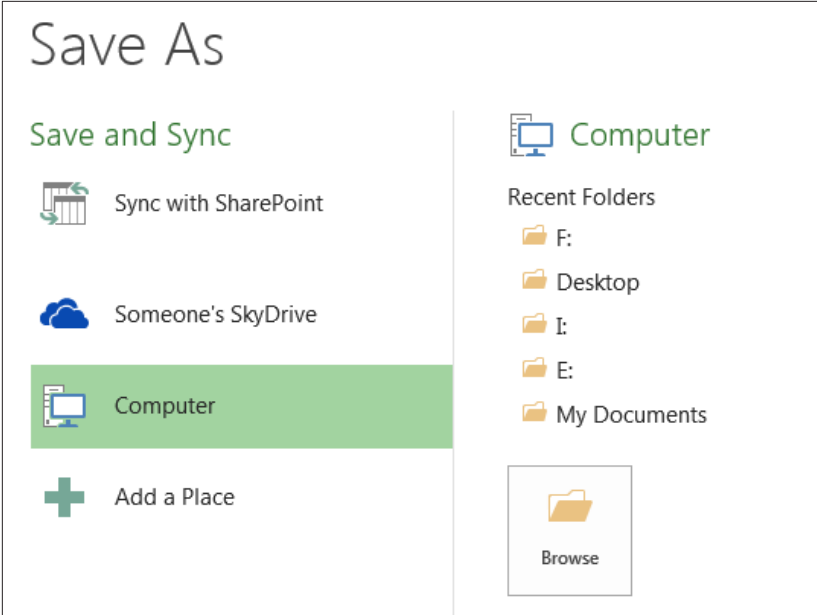


Figure 4-6 Save As

Table 4.3 PLACEHOLDER

Save or Save as Option	Features
Sync with Sharepoint Site	Save file to an existing Sharepoint site
Some's Skydrive	Save file to your Skydrive or a site you have access to

Table 4.3   **PLACEHOLDER**

Save or Save as Option	Features
Computer	Save file to location on a disk drive A list of recently used locations will be displayed
Add a Place	Add other locations such as Cloud or Office 365

## Share & Export

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## Calendar Overview

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Calendars in Project 2013 will determine when a task may be scheduled within the project schedule. It will also influence what defines a day, a week and a month within the project schedule. The calendars will also work hand-in-hand with the calendar options to determine when and how the tasks will be scheduled. Having the correct calendar applied to the project schedule before tasks are entered is essential for project scheduling success.

In this lesson we will explore:

1. How calendars work in Project 2013
2. How to Set Working Hours and Days
3. How to Set Non-Working Hours and Days
4. How to Set Calendar Options

## How Calendars Work in Project 2013?

---

There are several types of calendars within the Project 2013 system. The following are definitions of available calendars:

- **Project Calendar:** The project calendar is the calendar assigned to a project and it defines the project working and non-working days. The default name for the Project Calendar is "Standard".
- **Resource Calendar:** Each resource will have its own calendar which may be based off of a base calendar or the project calendar. Unique resource calendars may also be created.
- **Task Calendar:** A task calendar is assigned to a task to allow for the scheduling of that task in a unique timeframe. For example: tasks which have to occur on a weekend.

How the calendars are used by the software:



A task will be scheduled based on the Project calendar until a resource is assigned to the task. At that time, the Resource calendar will control the scheduling of the tasks. Unless – there is a task calendar assigned to a task which will override the Project calendar and the Resource calendars.

When a project schedule is created, a default calendar of “Standard” is applied to the schedule. This is called the Project Calendar for the project. The default values on the Standard calendar are: Monday through Friday which are working days, and working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily. No holidays are indicated on the calendar. The Standard calendar is also the calendar that will be viewed in the background of the Gantt Chart views. The Calendar Options work hand in hand with the Project Calendar to determine number of hours in a day or week and these values should be in sync with one another. The Calendar options will be discussed in the next section.

By default, 2 additional calendars are included with ms Project 2013: a 24 hour calendar and a Night Shift calendar. Either of these may be used as Project, Resource or Task calendars.

## FAQ's

Q: Why are there no holidays on the calendars?

A: This is an international program. Holidays vary from country to country.

Q: Is there the ability to add holidays to a calendar the way they can be added in Outlook?

A: No – this is not a capability of the software.

Q: Do I have to recreate the calendar for each project?

A: No – calendars may be created and saved through the Organizer to use in future projects. The Organizer will be covered later in this chapter.



The default calendar name for the system is “Standard”. If a different calendar name is selected, each Gantt view will also require changing because the calendar which is viewed Gantt Chart views are set to display the Standard calendar. This change can be made by right clicking in the Gantt view and select Non-working time and changing to the calendar to be seen in the view. Most users keep the Standard calendar because of ease of use.

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## Setting Working Hours and Days

---

After the project file has been created, decide what the working days (business days) of the project schedule will be. Decide also, how many hours will make up a working day and what times the hours will be. By default, the working days of the calendar are Monday through Friday and the working time is 8:00 am to 12:00 pm and 1:00 pm to 5:00 pm daily or 8 hours working per day.

To Change the Working Hours of all Days on a Calendar:

1. Click **Project → Change Working Time**
2. Check to ensure the calendar you wish to change is displayed in the **For calendar** list
3. Click **Work Weeks** near the bottom of the dialogue box

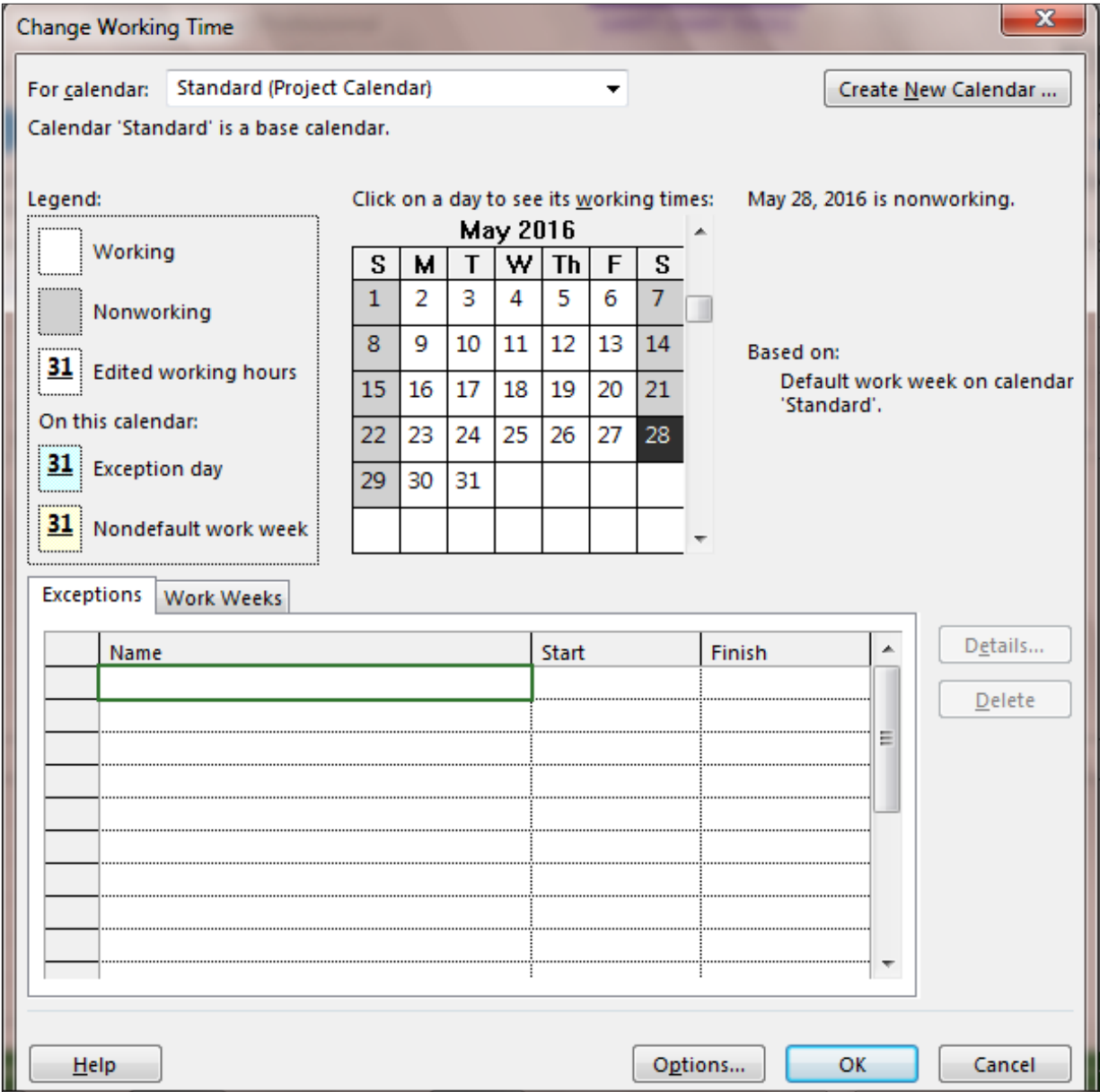


Figure 4-7 Calendar setting working hours & days

1. After clicking on the **Work Weeks** tab, the word **Default** should be highlighted. Click the **Details** button to the right of the form
2. Click **Monday**, press and hold the **shift** key and click on **Friday**. All of the working days will be selected

3. Click the **3rd radio button, Set day(s) to these specific working times**
4. You will see the standard working times. Make changes to reflect the new values
5. Click **Enter** or **Tab** to move away from the value you have changed
6. Click **ok** to close the form

Details for '[Default]'

Set working time for this work week

Select day(s):

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

☐ Use Project default times for these days.  
☐ Set days to nonworking time.  
☒ Set day(s) to these specific working times:

	From	To
	8:00 AM	12:00 PM
2	1:00 PM	5:00 PM

Figure 4-8 Calendar setting working hours & days specific times



Military time is valid when entering hour values. To change 5:00 pm to 4:00 pm to shorten the work day, simply enter **16** where 5:00 pm is located and click **Enter** or **Tab** and 4:00 pm will appear.

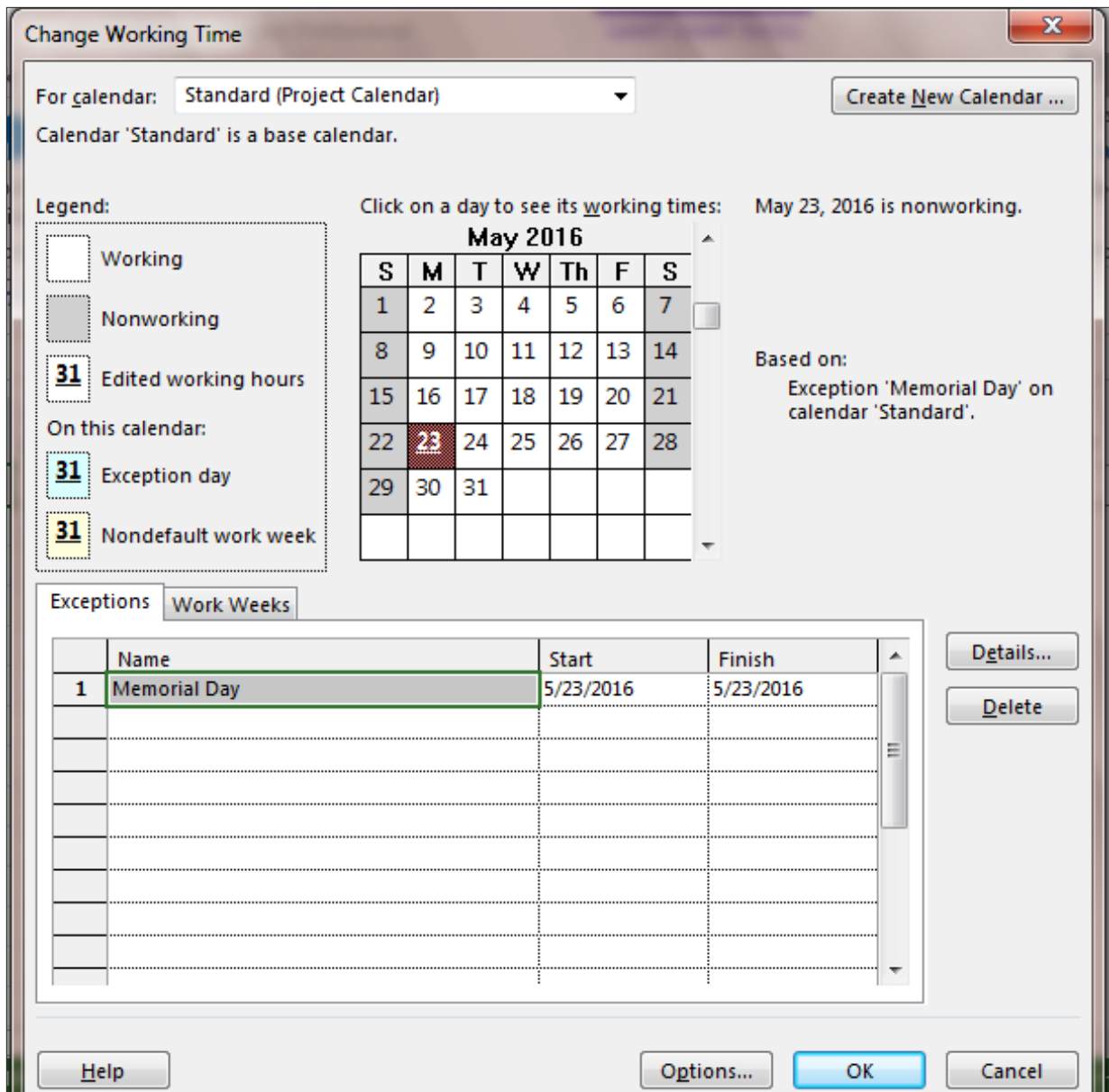
## Setting Non-Working Hours and Days

---

Non-working time is defined in the ms Project 2013 as days where work will not be planned or performed. Examples are: national and organizational holidays, training days, company shutdowns, summer hours, etc. Adding these non-working days and times to the project calendar will prevent tasks being scheduled on this non-working days.

### How to Create a Non-working Day for a Calendar

1. Click **Project** → **Change Working Time**
2. Check to ensure sure that the calendar you wish to change is displayed in the **For Calendar** field
3. Click **Exceptions** tab near the bottom of the dialogue box



**Figure 4-9** Calendar setting nonworking hours and days

- In this example, we will set May 23, 2016 as a non-working day. Move the slider on the right side of the calendar down until **April 2011** is displayed in the calendar
- Click **May 23, 2016**

- 6. Click in the name field and enter a reason for the non-working day, ie:  
Company holiday
- 7. Click **Enter**
- 8. Repeat for additional non-working days. See the result below

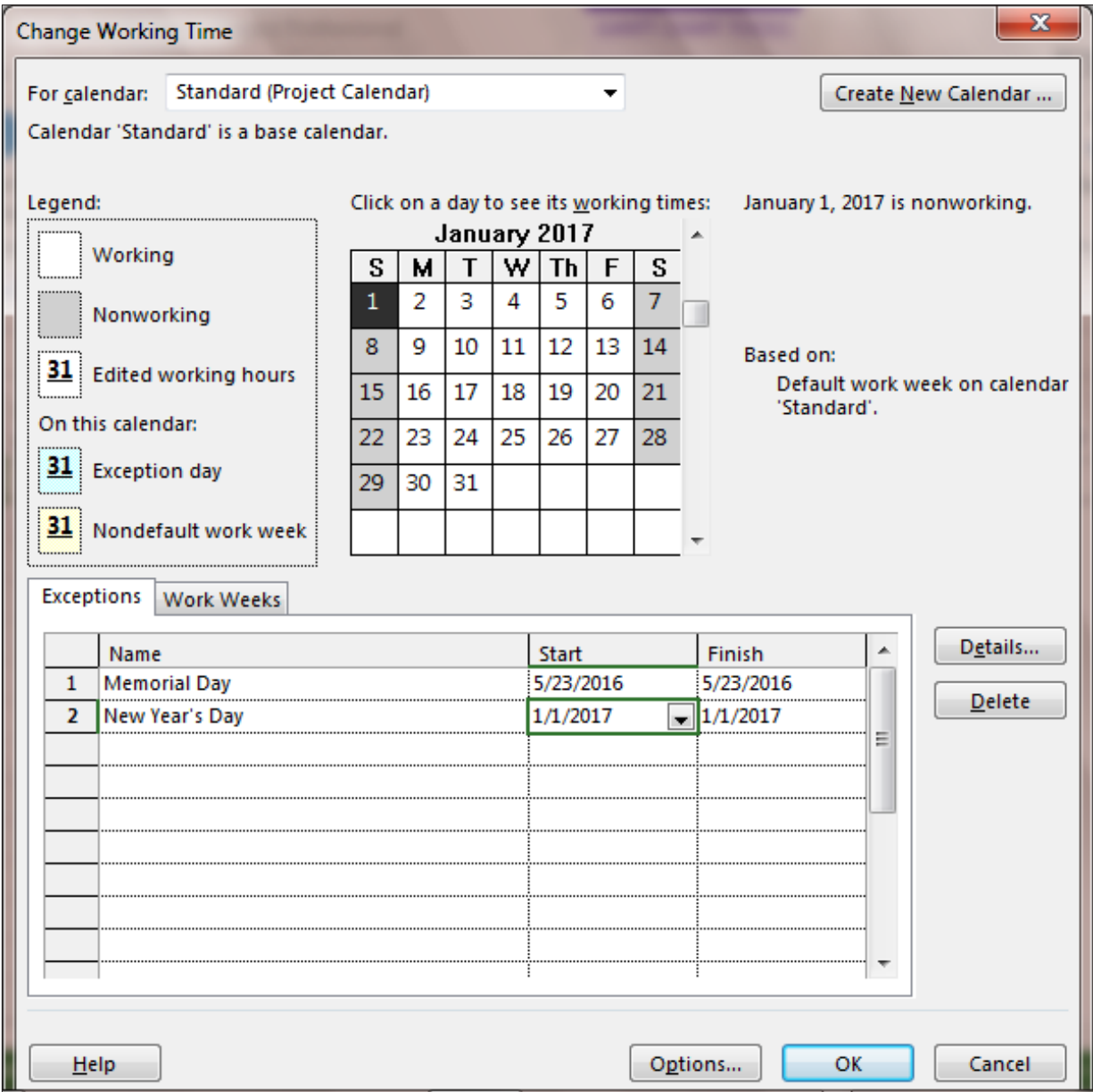


Figure 4-10 Calendar setting non-working hours & days



To Create a Recurring Non-working Day for a Calendar:

1. Click **Project → Change Working Time**
2. Check to make sure that the calendar you wish to change is showing in the **For calendar** field
3. Click **Exceptions** the tab near the bottom of the dialogue box
4. In this example, we will set January 1 (New Year's Day) as a recurring non-working day. Move the slider on the right side of the calendar down until **January 2017** is displayed on the calendar
5. Click **January 1, 2017**
6. Click in the first open line in the **Name** field and enter **New Year's Day** for the non-working day
7. Click **Enter**
8. Click back on the words **New Year's Day** and then click on the **Details** button to the right of the form
9. Click **Yearly**
10. Click on January 1
11. Enter the start date
12. Enter a recurrence value or an End by date
13. Click **ok** to close box
14. Check for the recurrence values in the Exceptions line for New Year's Day.

Details for 'New Year's Day'

Set working times for these exceptions

☒ Nonworking

☐ Working times:

	From	To

Recurrence pattern

☐ Daily

☐ Weekly

☐ Monthly

☒ Yearly

☒ On

January 1

☐ The

First

Sunday

of

January

Range of recurrence

Start:

1/1/17

☐ End after:

4

occurrences

☒ End by:

1/1/20

Help

OK

Cancel

Figure 4-11 Recurring holiday values on calendar

62

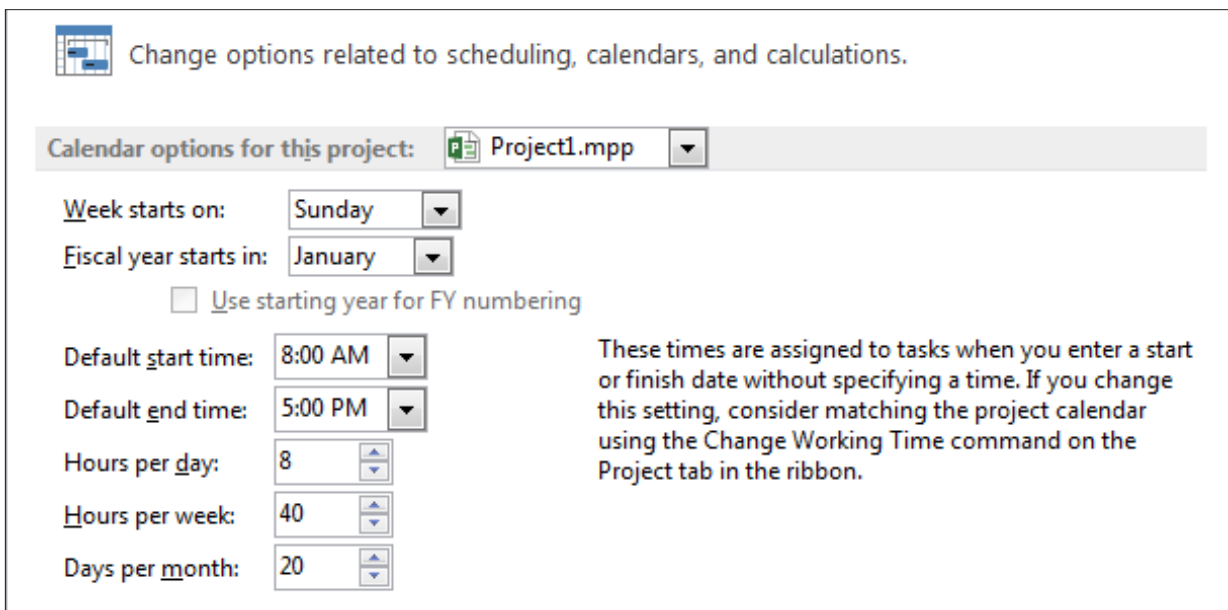
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## Setting Calendar Options


The Calendar options work hand in hand with the project calendar to determine how tasks will be scheduled. It is imperative that the calendar options match the project calendar to create a consistency in the scheduling values for tasks and assignment values.

To access the Calendar options:

Click **File** → **Options** → **Schedule**



Change options related to scheduling, calendars, and calculations.

Calendar options for this project:  Project1.mpp ▼

Week starts on: Sunday ▼

Fiscal year starts in: January ▼

☐ Use starting year for FY numbering

Default start time: 8:00 AM ▼

Default end time: 5:00 PM ▼

Hours per day: 8 ▼

Hours per week: 40 ▼

Days per month: 20 ▼

These times are assigned to tasks when you enter a start or finish date without specifying a time. If you change this setting, consider matching the project calendar using the Change Working Time command on the Project tab in the ribbon.

Figure 4-12 Calendar options

What the options mean:

- **Calendar options for this project:** option to select whether your option choices for the calendar will be held within an individual project or if they will be applied to all new projects.
- **Week starts on:** this choice will affect what is assigned and viewed as the first day of the week. The day chosen will be reflected on the Gantt Chart, Resource Usage, Task Usage and other calendar views.
- **Fiscal Year starts in:** if using this option, select which month will be the start of the fiscal year.

- **Default start and end times:** these values should match the time values on the project calendar. Assigning the project calendar will be discussed in the next lesson. The times stated here will be used to schedule tasks when time is not specified for a task. It will also be used to schedule tasks that do not use relationships. For example: if recurring tasks are created, the tasks will always be scheduled at the start time represented in this option.
- **Hours per day:** when 1 day of work is scheduled, how many hours should 1 day consist of?
- **Hours per week:** when 1 week of work is scheduled, how many hours should 1 week consist of?
- **Days per month:** when 1 month of work is scheduled, how many days should 1 month consist of?

## Saving the Calendar

---

In Project 2013, the calendar that was just created is known as a “custom object”. Custom or customized objects may be saved for use in the project the object was created in and used in other projects as well. To save objects the Organizer is used. When Project 2013 was installed on your system, a file named Global.mpt was created. The Organizer is the function that will copy objects into the Global.mpt as well as between project schedules. Calendars are only one of many object types that may be customized and saved for use in other project schedules.

To save the customized calendar, the object must be copied using the Organizer.

To copy a New Base Calendar into the Global.mpt:

1. Click **File → Info → Organizer**
2. Click the **Calendars** tab
3. Click **Standard** to the right and click **<<Copy**
4. An error message will appear: “Do you want to replace the Standard in ‘Global.mpt’ with the Standard from ‘<project name.’ Indicate “Yes.”
5. Click **Cancel** to close the box

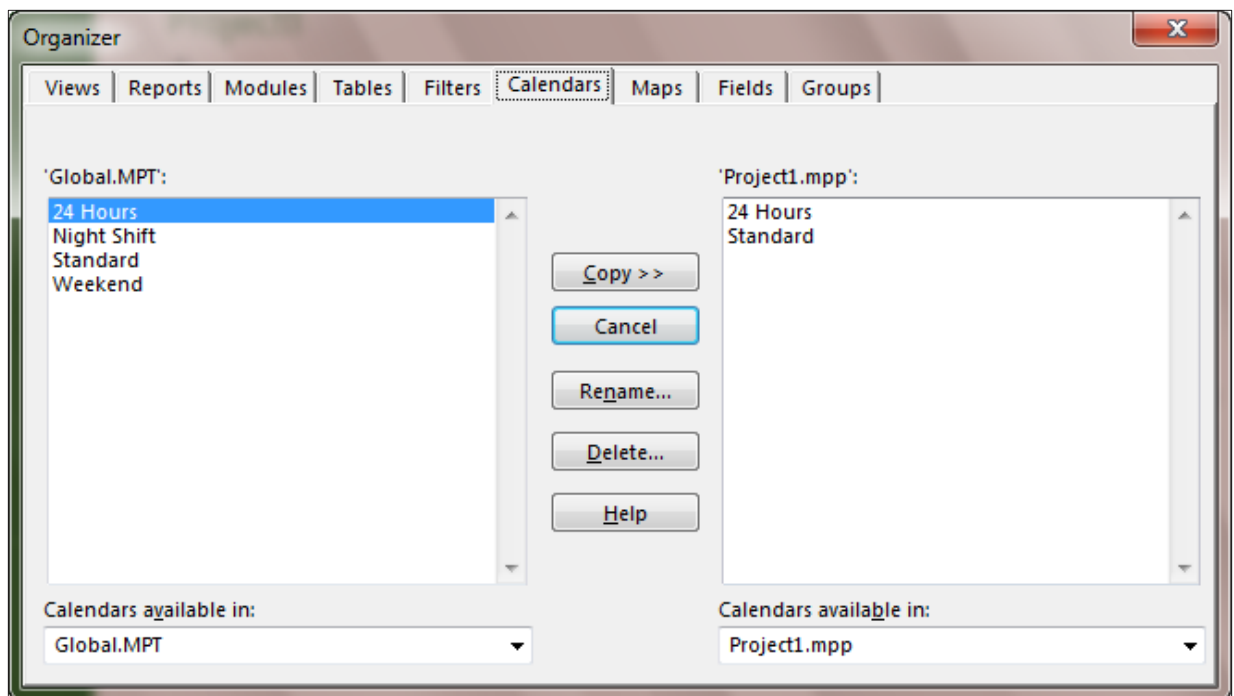


Figure 4-13 Organizer calendar view

The Calendar will be copied into your local Global.mpt.

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## Project Information

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The project information that should be entered before proceeding with project schedule development is the project start or project finish date as well as indicating which calendar will be used as the project calendar. This information is entered through the Project Information box.

To navigate to the Project Information dialogue box:

**Click** Project → Project Information

Deciding whether to enter the Project Start date or the Project Finish date will take some consideration. There are pros and cons to either choice:

**FAQ:** Should I enter a project start and finish date?

**Answer:** Project 2013 will accept either the start or the finish date but not both.

Entering a start date will indicate that you are planning your schedule as forward scheduling. This will result in:

- All tasks will be scheduled As soon as possible
- The work of the project will determine the project ending date
- You will have a date to manage your project to and know when you are on time or late with the progress of the project

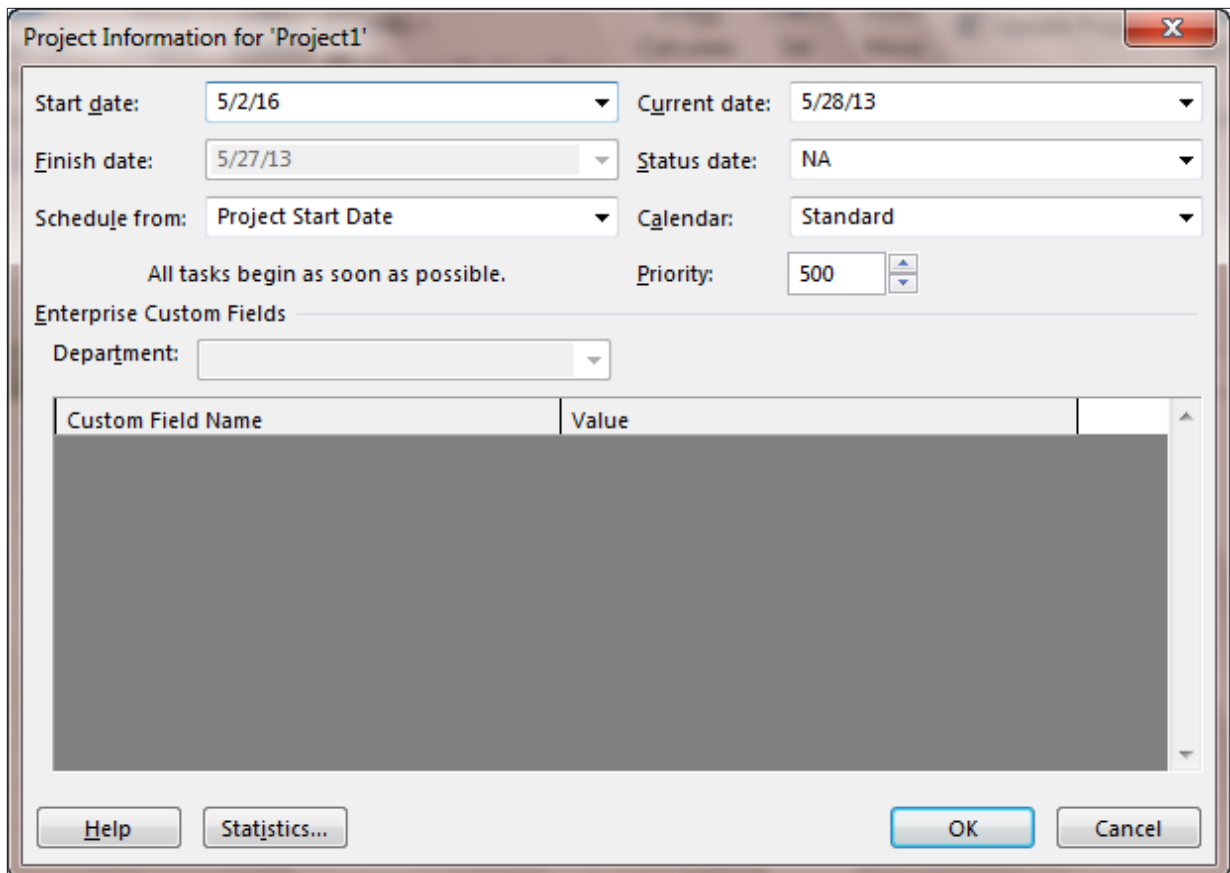
Entering a finish date will indicate that you are planning your schedule as backward scheduling. This will result in:

- All tasks will be scheduled As late as possible
- The ending date of the project will be locked to a date on the calendar
- You might be planning a project where each task will be required to be completed as planned to achieve the ending date goals.

The most used planning method is that projects are planned from the project start date.

**Project Calendar:** The default calendar is “Standard”. Whatever calendar is selected will become the scheduling calendar for the project. All tasks will be scheduled using this calendar until a resource is assigned to the task.

Click **OK** to close the box.



Project Information for 'Project1'

Start date: 5/2/16 Current date: 5/28/13

Finish date: 5/27/13 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

Enterprise Custom Fields

Department:

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

Help Statistics... OK Cancel

Figure 4-14 PLACEHOLDER



Most project managers have definite deadlines. Consider planning the schedule from ending date to get the schedule short term goals, deadlines and milestone dates. Then switch the project to the start date to manage. Reset the constraints to as soon as possible to enable the schedule to include slack and aid in schedule management.

---

## Options

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The last action you should be before entering your first task is to set some of the options to match the requirements of your project.

Options are flexible in that they can be applied per unique project or to all new projects created on your computer. In this section we will discuss the options that will affect scheduling. These options are in addition to the calendar options discussed earlier in this chapter.

---

## General vs Per Project Options

---

General options are options which affect how the installation of Project 2013 on a desktop will operate. Per Project options are options that will apply to a unique project. You may optionally apply the per project options to all new projects.

Display options are options that will help the user interface with Project 2013 software. The options selected are unique to each user and are a personal preference. These options do not have an influence on the ability to create a project schedule.

To navigate to General options:

Click **File → Options → General**

In the Project view section, the user may select the default view for usage of Project 2013 and the date format for dates for reports and views (tables).



General options for working with Project.

**User Interface options**

ScreenTip style: Show feature descriptions in ScreenTips

**Project view**

Default view: Gantt with Timeline

Date format: 1/28/09

**Personalize your copy of Microsoft Office**

User name: Ellen Lehnert

Initials: EL

☒ Always use these values regardless of sign in to Office.

Office Background: Stars

Office Theme: White

**Start up options**

☒ Show the Start screen when this application starts

Figure 4-15 General options

To navigate to Display options:

Click **File** → **Options** → **Display**

These options refer to which elements should be viewed on the screen. These options will control which indicators are shown in the indicator column, currency values and if the Entry bar is visible or not.

Change how Project content is displayed on the screen.

**Calendar**

Calendar Type: Gregorian Calendar

**Currency options for this project:** Project1

Symbol: \$ Decimal digits: 2

Placement: \$1 Currency: USD

**Show indicators and options buttons for:**

☒ Resource assignments ☒ Edits to work, units, or duration

☒ Edits to start and finish dates ☒ Deletions in the Name columns

**Show these elements:**

☒ Entry bar

Figure 4-16 **PLACEHOLDER**


Additional display options are available at:


Click **File → Options → Advanced**


Some of the options that should be considered are:

- **Show this number of recent documents** – optional number, list will show in the Recent tab in the backstage
- **Automatically add new views, tabs, filters and groups to the global** - recommended
- **Settings for duration label values** – Minutes, Days, etc. - may alter as needed
- **Show project summary task** – recommended

**Display**


Show this number of Recent Projects: 20 


☐ Quickly access this number of Recent Projects: 4 

Show this number of unpinned Recent Folders: 5 



☒ Show status bar ☒ Show scroll bars



☒ Show windows in Taskbar ☒ Show QLE links indicators



☒ Use internal IDs to match different-language or renamed Organizer items between projects 



☒ Automatically add new views, tables, filters, and groups to the global 

☐ Disable hardware graphics acceleration

Display options for this project:  Project1.mpp 

Minutes: min  Weeks: wk 


Hours: hr  Months: mon 

Days: day  Years: yr 

☒ Add space before label

☐ Show project summary task

☒ Underline hyperlinks

Hyperlink color: 


Followed hyperlink color: 

Figure 4-17 Display options in the advanced options



Each project schedule has the ability to contain a Project Summary task. The Project Summary task is a zero level task that will serve as a constant grand total for the project schedule. The setting in the above option may be used to turn on the project summary task by default for all projects.

To turn on the Project Summary task:

Click **Task** → **Gantt Chart**

Click **Format** → **Project Summary Task** (on the right side of the ribbon)

## Scheduling Options

---

To understand the Scheduling options it would be helpful to review some of the scheduling terms the options are referring to.

ms Project 2013's schedule engine it is using the terms "Duration" and "Work" which is fundamental to understanding project scheduling.

## Definitions

- **Duration:**
  - Is a length of time ie: a day, a week, or a month
  - It is the amount of actual time that will pass before a task is completed
- **Work:**
  - Is the quantity of work that occurs ie: 8 hours in one day, 40 hours in a week
  - It is the amount of work (effort or man hours) which a resource(s) will work to complete the task



It is very helpful within an organization to have a standard for these terms. IE: All work will be planned in hours and all durations will be planned in days.

## Effort-driven scheduling

Tasks have the option of being scheduled using Effort-driven scheduling. Effort-driven scheduling is defined as when more workers are added to a task, the effort (or work) will be divided across the workers.

For example: A project has a task called “Moving Boxes”. The work of the task is to move 100 boxes from location A to B. If one person moves the boxes, it will take 10 hours of duration moving 10 boxes per hour. However, if 2 people move the boxes it will take 5 hours, 3 people can accomplish this task in one-third of the original time, etc.

With effort-driven scheduling the duration of the task will shorten when more workers are added because the work is divided over the resources.

## Define Duration, Work, Task Types and Effort Driven

---

## Understanding Task Typing

Each task will be assigned a task type when the task is added to the schedule. Task types work hand-in-hand with the effort-driven option discussed above. Task types will determine how a task is scheduled and will have an effect on the assignment of the resources to the task. Task types are considered unique per task and should be set on a task by task basis.

The option will be setting is to establish the default task type you would like each task to acquire when it is entered. Task types may be changed to match the needs of the tasks at a later point in time.

ms Project 2013 allows for the following 3 task types:

- **Fixed Duration:** A fixed duration task is a task created with a fixed length of time. Fixed Duration tasks are also tied to dates.

Example: This training class. When the time scheduled for this class is over, the work of the class is completed.

- **Fixed Units:** Units means quantity of resource. Fixed Units means that the resource assignment quantity is fixed for the task. Using this task type will result in the quantity of the units assigned to a task coupled with the availability of the resource to determine the scheduling of the task.

Example: If you assign a resource to a 5 day, 40 hour task at 100% of their effort the task will be completed in 5 days working 8 hours per day. If you assign a resource to the same task with 50% of their effort, the task will be worked 4 hours per day and will be scheduled for 10 days of duration. The 100% and 50% are the resource units.

- **Fixed Work:** The work of the task is fixed. Fixed work tasks, by default, are also effort-driven. The more resources assigned to the task, the less time the task will take to be complete. Fixed work tasks will be scheduled based on the quantity of the units of the resources assigned to the task and their availability based on their resource calendar.

Example: If a task called "Plan event" will take 80 hours of work to complete, the work will be completed in 2 weeks with 1 full time resource. If a second resource is added full time, the task will be completed in 1 week dividing the work between the 2 resources. Each resource would have performed 50% of the work. As resources are added to the task, the duration of the task is reduced.

## Task type, Effort-driven combinations

When task types are coupled with the effort-driven option, the scheduling engine allows for the following task type, effort-driven combinations:

- Fixed Duration, Effort-driven on
- Fixed Duration, Effort-driven off
- Fixed Units, Effort-driven on
- Fixed Units, Effort-driven off
- Fixed Work, Effort-driven on

The project options will allow for setting a default that each task will be assigned when the task is entered. It should be noted that each task is

different and unique. The default should be considered a starting point.

## Scheduling Options

Scheduling options are per project options which establish the defaults how a project will be scheduled. These options are unique per project and should be checked before entering tasks into a project schedule. These options also may be changed at any time over the life of the project schedule.


To set the scheduling options:

Click **File** → **Options** → **Schedule**

Schedule

☒ Show scheduling messages ⓘ

Show assignment units as a: Percentage ▼

Scheduling options for this project:  All New Projects ▼

New tasks created: Auto Scheduled ▼

Auto scheduled tasks scheduled on: Project Start Date ▼

Duration is entered in: Days ▼

Work is entered in: Hours ▼

Default task type: Fixed Units ▼

☐ New tasks are effort driven ⓘ

☒ Tasks will always honor their constraint dates ⓘ

☐ Autolink inserted or moved tasks ⓘ


☒ Show that scheduled tasks have estimated durations ⓘ

☒ Split in-progress tasks ⓘ

☒ New scheduled tasks have estimated durations

☒ Update Manually Scheduled tasks when editing links

☐ Keep task on nearest working day when changing to Automatically Scheduled mode

Schedule Alerts Options:  All New Projects ▼

☒ Show task schedule warnings

☐ Show task schedule suggestions

Figure 4-18 Schedule options

- **Show scheduling messages:** gives the scheduler error messages concerning scheduling inconsistencies and warnings.
- **Show assignment units as a:** options are percentage or decimal. This is user preference. It may be changed at any time without affecting the schedule.
- **Scheduling options for this project:** options that can be assigned to a specific project or all projects.
- **New tasks created:** manually scheduled or automatically scheduled. This is the default value and may be adjusted per task.
  - **Manually scheduled:** tasks will be entered without a start or finish date and without task duration. All values are entered manually.



- **Auto scheduled:** tasks will be entered with a default duration of 1 day and a start and finish date.
- **Auto scheduled tasks scheduled on:** project state date or current date. If you are managing a long project it might be easier to change this option for all new tasks to start on the current date.
- **Duration is entered in:** minutes, hours, days, weeks, months
- **Work is entered in:** minutes, hours, days, weeks, months
- **Default task type:** Fixed Units, Fixed Duration, or Fixed Work
- **New tasks are effort driven:** check for yes
- **Update Manually Scheduled tasks when updating links:** when tasks are manually scheduled should the project schedule successor tasks based on relationship links



It is a good idea within an organization to establish a standard for Duration and Work. When duration is discussed or appears on a report it will be easier for stakeholders to understand that duration always means hours or the value that works for the specific project. If you have a 3 year project, you probably will not be planning work at the hour level so weeks might be the duration standard.





## Chapter 5

# **Task Development**

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## Creating the Work Breakdown Structure

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Once the tasks of the project are established, the next step is to enter the tasks into the project schedule and create a wbs structure. Entering tasks may be a manual keying process or they may be imported from a SharePoint list (Project 2013 Pro only), an Excel workbook, an Outlook task list or a Word document. Tasks may also be copy and pasted into project schedules. This lesson addresses the manual entering of tasks into the project schedule.

In this lesson, we will discuss:

- WBS
- Entering tasks
- The Task Information Form
- Outlining tasks into a wbs Hierarchy
- Displaying wbs code values
- Customizing wbs code numbers
- Manual vs Automatic

## Overview of Work Breakdown Structure

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The next step in creating a project schedule is to enter the tasks for the project. What work should be planned and how should the tasks be organized? The Work Breakdown Structure or wbs is the task list for the project. How the wbs is structured will have influence reports that are generated from the schedule and ease of managing the schedule. These questions and others need to be answered in order to create a project schedule that will help you manage your projects.

## What is a Work Breakdown Structure or WBS?

Simple projects like packing for a trip might not need a plan to accomplish the project. When packing, most people will make of list of the items to pack. Everything on the list is added to the suitcase and the project is completed. Not all projects are this simple.

Larger projects like building a house will require more planning and detail to accomplish the goals of the project. More tasks will be required, more detail and organization to the detail. More data will be accumulated regarding how the project was performed. To accomplish these types of projects, a work breakdown structure or wbs will be required.

The wbs is a hierarchical structure much like an outline list. This structure will contain the work of the project. When developing a wbs the total work of the project is divided into chunks of work. The larger chunks are subdivided into smaller chunks. After the work is divided it is then organized into a hierarchical structure. Within the structure some tasks will serve as titles, some tasks will be goal points and others will contain task work details .

Consider the wbs of a project the same as the foundation for a building. Without a stable foundation the building will not be stable. Having a stable or well-planned wbs will be an asset to the performance of a project. Having an unstable wbs may adversely affect the management of the project schedule.

## Task Categories

When building a wbs using ms Project 2013 there are 4 categories of tasks available to use. The categories are:

**Project Summary Task:** This is a task that will provide title and a grand total for the project. It is the top level task (level 0) and it can be turned on and off as needed.

**Summary Tasks:** These tasks are section titles that will also provide subtotals throughout the project.

**Tasks or Detail Tasks:** These are work tasks within the project. Work tasks will carry the work and duration for the project as well as costs.

Resources or workers will be assigned to this task category and tracking will occur for these tasks.

**Milestones:** Milestones are points in time. They become the goal points within the project and can provide high level timeline reports.

## Entering Tasks

Entering tasks into Project 2013 is as easy as typing the task name into the Task Name field. When entering a new task, keep in mind that data is being populated in an array of fields for that row; several hundred fields will be created and some populated. After tasks are entered they may be moved, deleted, or copy/pasted to other areas of the schedule. It is also recommended that the Project Summary Task be turned on to aid in schedule development.

To turn on the Project Summary task:

- Click on **Format → Project Summary Task** (In the show/hide section on the right)
- Click the **check box** to turn on

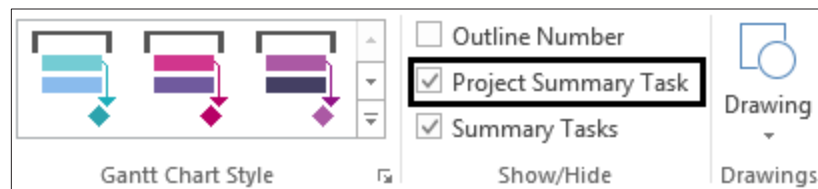


Figure 5-1 Project Summary Task

To enter a new task:

- Click the **Task Name** field on the row you would like to enter and type the task name.

To move a task to another location in the schedule:

- Left Click on the task number (ID) in the left column. Hold the click down and wait for the 4 way arrow to appear and drag to the task to the new location. (Works well when the new location can be seen on the screen)

OR

- Click on the **task number** of the task you wish to move
- Click **copy** (or cut)
- Scroll to the new location

- Click **Paste** – Project 2013 will insert the pasted task








		Task Mode ▾	Task Name ▾	Duration ▾	Start	May 1, '16		
						S	M	T
0			▲ Sell my house	1 day	5/2/16			
1			Fix up house to sell	1 day	5/2/16			
2			Paint bedrooms & Family Room	1 day	5/2/16			
3			Replace carpeting	1 day	5/2/16			
4			Repair roof	1 day	5/2/16			
5			Fix up completed	1 day	5/2/16			

Figure 5-2 Task number



Entering blank lines to receive the moved tasks is not necessary. The schedule will insert the lines and move tasks down to accommodate the moved tasks.














To add blank lines schedule between existing tasks:

- Right click on the **task** below the location of the new task to be inserted
- Click **Task → Task** – a blank row will be created above the task selected

OR

- Click on a task
- Click **Insert** key on the keyboard

In the view below task 6 was entered using the Task → Task insert method. Note the default data and <New Task> name entered. Task 8 was the result of clicking the Insert key on the keyboard.

		Task Mode ▾	Task Name ▾	Duration ▾	Start	May 1, '16		
						S	M	T
3			Replace carpeting	1 day	5/2/16			
4			Repair roof	1 day	5/2/16			
5			Fix up completed	1 day	5/2/16			
6			<New Task>	1 day?	5/2/16			
7			Clean up House	1 day	5/2/16			
8								
9			Clean out storage space	1 day	5/2/16			

**Figure 5-3** Task 6 was created by clicking on the “Clean Up House” task and click on the Insert → Task button on the Task ribbon. Task 8 was created by clicking on the “Clean out storage space” task clicking the insert key on the keyboard.

To delete tasks from the schedule:























- Right click the task to be deleted
  - Click **Delete Task** option
- OR
- Click the task to be deleted
  - Click the **Delete** key on the keyboard



If you have clicked anywhere within the task row and deleted the task a Smart Tag will appear to ask if you want to clear the field or delete the task.

In the view below the result of clicking on the Smart Tag (the X with the down arrow) is shown. Make your selection from the choices in the box below.



		Task Mode ▾	Task Name ▾	Duration ▾	Start	May 1, '16	
						S	M
3			Replace carpeting	1 day	5/2/16		
4			Repair roof	1 day	5/2/16		
5			Fix up completed	1 day	5/2/16		
6			<New Task>	1 day?	5/2/16		
7			Clean up House	1 day	5/2/16		
8		 		1 day	5/2/16		
9			<input checked="" type="radio"/> Delete the task name.	1 day	5/2/16		
10			<input type="radio"/> Delete the task.	1 day	5/2/16		
11			Clean up completed	1 day	5/2/16		
12			Hire Realtor	1 day	5/2/16		

**Figure 5-4** Smart tag asking the user to select if the task name should be cleared or the entire task deleted.

## Moving and Copying Tasks

If you want to create a task that is similar to an existing task, you can copy the existing task and then modify the copy.

To copy a task:

1. Select the entire row of the task you want to copy by clicking on its ID field. If you only want to copy one field, such as the task name, select only that field.
2. In the **Task** Tab, **Clipboard** group, click **Copy**. Project copies the task to the Clipboard.
3. Select the task below the line the task will be inserted.
4. In the **Task** tab, **Clipboard** group, click **Paste**.



Keyboard shortcuts **Ctrl+C** (copy) and **Ctrl+V** (paste) will work as well.

You can also copy a single cell of data, rather than the entire task row.



Be aware that when you paste the contents of a single field, Project overwrites the contents of the field into which you paste. If you paste the single field into a blank row, Project creates a new task.

To move a task:

1. Click the ID number of the task to select the entire row.
2. Drag the entire task to the new location, between two existing tasks.

If you drag the contents of a single field to another field, Project overwrites the contents of the field.

If you move a task that is within a series of tasks that are linked sequentially, Project automatically adjusts the link relationships of the remaining tasks to reflect the new task order. Project does this only if the current task is linked to the task directly above and below. The moved task will maintain the original link to predecessors. Linking to a new series will need to be done manually.

## Task Information Form

The Task Information box is a source of easy access for some of the frequently used fields on the task side of the data for a Project 2013 project schedule. Data entered in the form is the same as entering data into a column in a table for a task. Using this box is a quick and easy way to view and maintain task information.

To access the Task Information Form:

- Double click an **task data** field within a task
- OR
- Click on a **task**
- Task **ribbon** → **Information**

The form below will appear:

The screenshot shows a 'Task Information' dialog box with the following details:

- General Tab:**
  - Name: Paint bedrooms & Family Room
  - Duration: 1 day
  - Percent complete: 0%
  - Priority: 500
  - Schedule Mode: ☒ Auto Scheduled, ☐ Manually Scheduled
  - Dates: Start: 5/2/16, Finish: 5/2/16
  - Display on Timeline: ☐
  - Hide Bar: ☐
  - Rollup: ☐
- Other Tabs:** Predecessors, Resources, Advanced, Notes, Custom Fields
- Buttons:** Help, OK, Cancel

Figure 5-5 Task info box

The form contains several tabs of information, grouped by subject. Each tab will allow access to the Task name, Duration and Estimated flag.

**General tab:** contains Name, Duration, Percent complete, Priority, Schedule Mode, Inactive, Start and Finish dates, Display on Timeline, Hide Bar and Rollup.

**Predecessors:** contains information concerning task relationships.

**Resources:** contains information concerning resources assigned to the task.

**Advanced:** contains information concerning Deadlines, Constraints, Task Types, Task Calendars, Effort-driven flag, was number and Milestone flag for the task.

**Notes:** general notes area for the task

**Custom fields:** If task level custom fields (user-defined) were created for the project, they would be accumulated and accessible through this area.



Data may be changed in multiple tasks at the same time. Select the tasks to be changed and then click on the Information icon on the Task bar. The box that appears is called the Multiple Task Information box. Make the changes and click ok to update.














		Task Mode ▾	Task Name ▾	Duration ▾	Start	May 1, '16	
						S	M
0			▾ Sell my house	1 day	5/2/16		
1			Fix up house to sell	1 day	5/2/16		
2			Paint bedrooms & Family Room	1 day	5/2/16		
3			Replace carpeting	1 day	5/2/16		
4			Repair roof	1 day	5/2/16		
5			Fix up completed	1 day	5/2/16		

Figure 5-6 Select multiple tasks

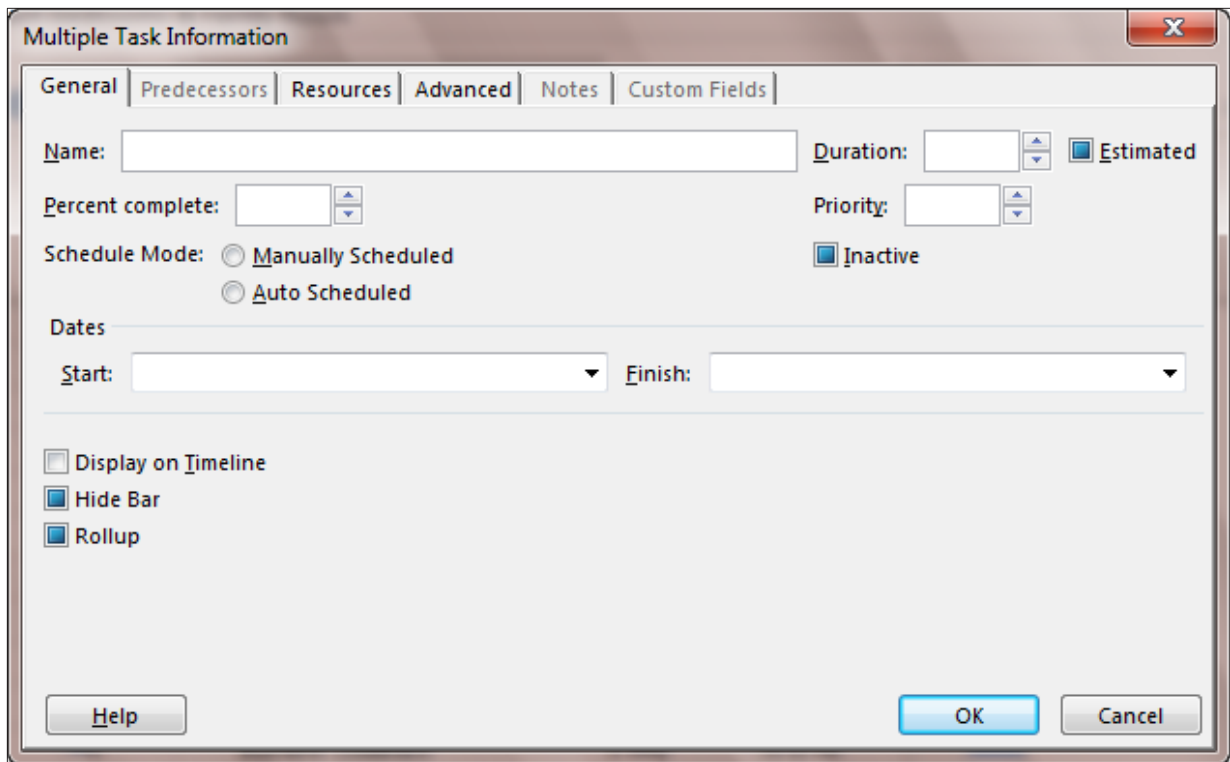
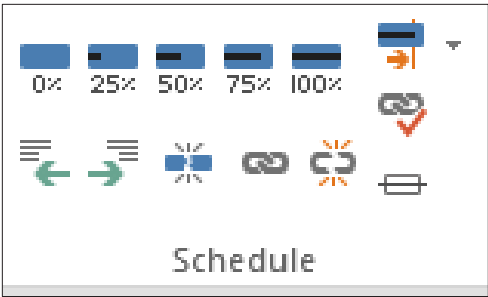
The image shows a 'Multiple Task Information' dialog box with a title bar and a close button. It has several tabs: 'General', 'Predecessors', 'Resources', 'Advanced', 'Notes', and 'Custom Fields'. The 'General' tab is active. It contains fields for 'Name', 'Duration' (with up/down arrows), 'Estimated' (checkbox), 'Percent complete' (with up/down arrows), 'Priority' (with up/down arrows), 'Inactive' (checkbox), 'Schedule Mode' (radio buttons for 'Manually Scheduled' and 'Auto Scheduled'), 'Dates' (with 'Start' and 'Finish' dropdowns), 'Display on Timeline' (checkbox), 'Hide Bar' (checkbox), and 'Rollup' (checkbox). At the bottom are 'Help', 'OK', and 'Cancel' buttons.

Figure 5-7 Multiple task info box

Selecting multiple tasks and then clicking on the Information icon will allow for values to be changed for all of the selected tasks.

## Outlining Tasks into a Hierarchy

Once tasks are entered, the wbs outline structure may be created. To create the outline structure, tasks will be indented or outdented. These buttons are located on the Task ribbon in the schedule section and are the green arrows in the lower left corner. The indent button is pointing to the right. The outdent button is pointing to the left. See below:



**Figure 5-8** Schedule section of Task ribbon bar. Outdent is in the lower left corner, arrow pointing to the left. Indent has the Arrow pointing to the right.

- To indent a task:
- Click the task to be indented
  - Click the **indent** (pointing right green arrow)
- OR
- Place the mouse pointer over the task and a horizontal arrow will appear. Left click and drag the task to the right
- To outdent a task or remove an indentation:
- Click the task to be outdented
  - Click the **outdent** (left pointing green arrow)
- OR
- Place the mouse pointer over the task and a horizontal arrow will appear. Left click and drag the task to the left
- When a task has an indented task below it, the task becomes a summary task. Summary tasks are represented as black bars on the Gantt chart as shown below:

Task Name	Duration	Start	May 1, '16	
			S	M
▲ Sell my house	1 day	5/2/16		
▲ Fix up house to sell	1 day	5/2/16		
Paint bedrooms & Family Room	1 day	5/2/16		
Replace carpeting	1 day	5/2/16		
Repair roof	1 day	5/2/16		
Fix up completed	1 day	5/2/16		

**Figure 5-9** The task named “Fix up house to sell” became a Summary task when all of the tasks below it were indented. Note the summary task formatting on the

Gantt Chart.

Indenting and outdenting can be confusing. At times it is difficult to achieve the desired structure results.



When indenting, work from the top down. When outdenting, work from the bottom up.

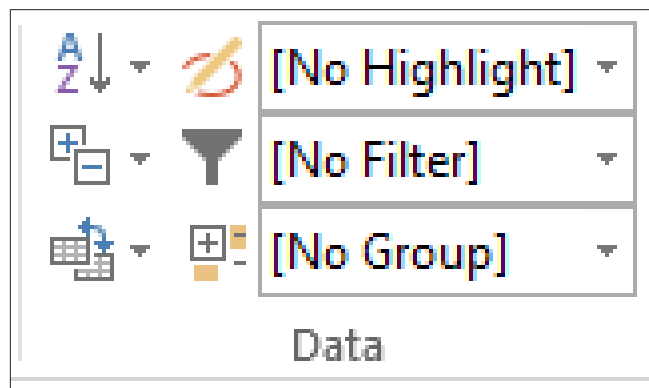
To see the levels of the WBS:

Project Summary tasks and Summary Tasks will have a small box to the left of the summary task name as seen in the screen above.

- Click the **plus** sign + to expand tasks
- Click the **minus** sign – to collapse tasks

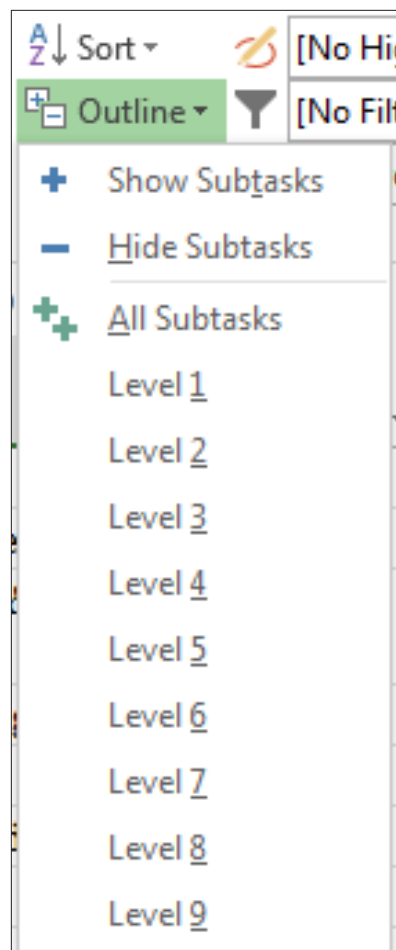
Use the Outline button to jump to a level of detail:

Click on **View** → **Outline**:



**Figure 5-10** The Outline button is in the Data section of the View ribbon bar. Use this button to view various levels of the WBS.

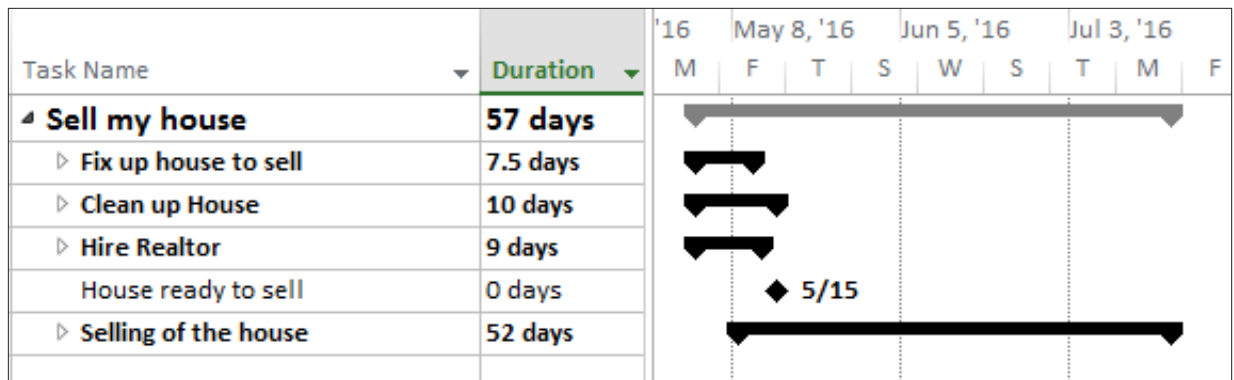
When the **Outline** down arrow is clicked, the following choices appear:



**Figure 5-11** Clicking on the Outline button will reveal choices for selecting the outline detail level to view.

The following image shows a view of a collapsed wbs – **Outline level 1** was selected. Note the rolled up view of the tasks:





**Figure 5-12** The result of selecting Outline 1 which will collapse the detail to the highest level

The following image shows a view of an expanded outline wbs – **All Subtasks** was selected:

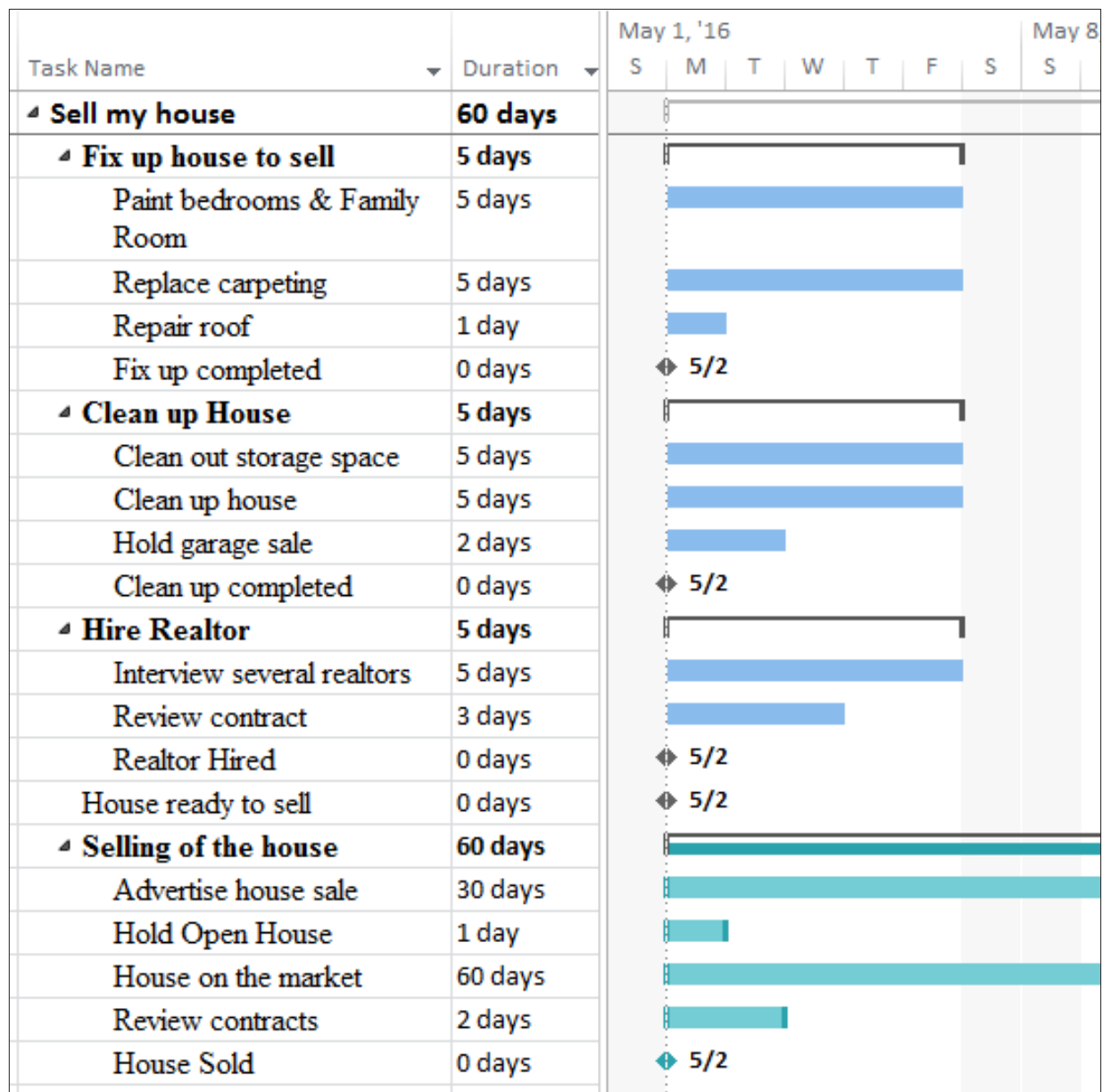


Figure 5-13 All tasks

Clicking **Project Summary** task and then **Hide Subtasks** will collapse the project down to just the Project Summary task.

If the outline is collapsed, clicking **All Subtasks** will show all tasks at all levels of the wbs.

The outline list offers the option to create up to 9 wbs levels. There are many more levels available in Project 2013 but it is advised that wbs levels should not exceed 5. The more wbs levels there, the more confusing and cumbersome a wbs may become.

## Displaying Outline Numbers & WBS

As the wbs structure is created, an automatic numbering sequence is also created within the task list. The numbers represent where in the wbs structure the tasks reside. This is a unique numbering scheme and numbers are automatically reassigned as tasks are moved around the wbs structure. There are default number values and customized wbs number values. In this lesson, we will address the standard wbs values; the following lesson will address the customized values available.

To view insert the wbs column into a table:

- In the Gantt chart view right click on a column heading. To Insert a column into a table, right click on the column header to the right of where you would like the inserted column to be located. After the column is inserted it may be moved to an alternate location if needed.
- Select Insert Column
- Click the **W** key on the keyboard
- Select “wbs”
- Click ok

Below is an example of wbs numbering schema:

WBS ▼	Task Name ▼
<b>0</b>	<b>▸ Sell my house</b>
<b>1</b>	<b>▸ Fix up house to sell</b>
1.1	Paint bedrooms & Family Room
1.2	Replace carpeting
1.3	Repair roof
1.4	Fix up completed
<b>2</b>	<b>▸ Clean up House</b>
2.1	Clean out storage space
2.2	Clean up house
2.3	Hold garage sale
2.4	Clean up completed
<b>3</b>	<b>▸ Hire Realtor</b>
3.1	Interview several realtors
3.2	Review contract
3.3	Realtor Hired
<b>4</b>	House ready to sell
<b>5</b>	<b>▸ Selling of the house</b>
5.1	Advertise house sale
5.2	Hold Open House
5.3	House on the market
5.4	Review contracts
5.5	House Sold

**Figure 5-14** The wbs column is displaying the system assigned wbs numbers associated with the tasks.



Because automatic wbs numbers are updated as tasks are moved or added to the wbs, it is not recommended that these numbers be used as a task tracking number. If a task tracking number is desired, consider using the field called “Unique ID”. This field is the order, in which tasks were added to the schedule and they will always be unique and will not be duplicated within a schedule.

## Collapsing and Expanding the Outline

One of the main benefits of outlining is that you can control the level of detail that Project displays. For example, if you want to inform upper management about the status of your project, they may not be interested in the daily tasks, only the major phases. You can collapse the outline to display only summary tasks, you can expand the outline to display all of the tasks, or you can display the subtasks for some summary tasks, but not for others.

There are carat symbols to the left of the Summary task names. Clicking on these symbols will allow for expansion or collapsing of the wbs. If the carat is black and pointing down (▲), that means all of the tasks are expanded for that summary grouping. If the carat is clear and pointing to the right (▶), the summary grouping is collapsed.

To collapse the schedule outline:

1. Select the desired Summary task.
2. Click the ▲ to the left of the Summary task.

Task Name	Duration	May 1, '16						
		S	S	M	T	W	T	F
▲ <b>Sell my house</b>	<b>60 days</b>							
▲ <b>Fix up house to sell</b>	<b>5 days</b>							
Paint bedrooms & Family Room	5 days							
Replace carpeting	5 days							
Repair roof	1 day							
Fix up completed	0 days							

Figure 5-15 Expanded task details

- To expand the schedule outline:
1. Select the desired Summary task.
  2. Click the plus (+) sign icon to the left of the Summary task.

▶ Clean up House	5 days		
▶ Hire Realtor	5 days		

Figure 5-16 Collapsed task detail

## Customizing WBS Codes

The user has the option of customizing wbs numbers using a **Code Mask** and values entered by the user. When this option is evoked, additional options to re-number the wbs, enforce value uniqueness and optionally generate wbsnumbers become available. The customized number values are helpful when mangning multiple projects or if there is a need to reference numbers unique to a project schedule. They are also helpful if using templates that result in frequently used task names. These codes could indicate which tasks are members of which project schedules and where the tasks are located within the project schedule.

- To customize the wbs numbers:
- Project → wbs button → Define

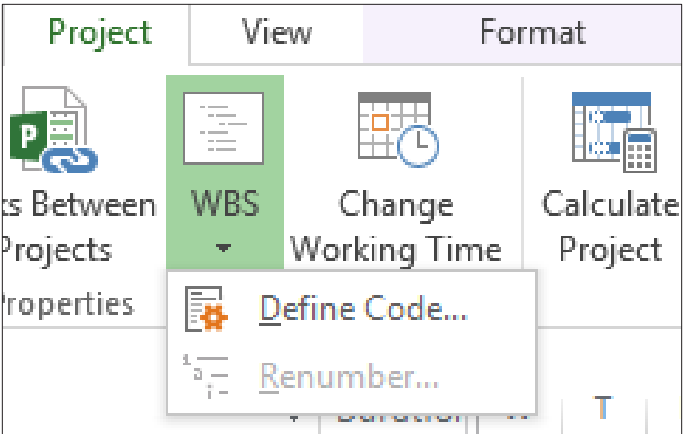


Figure 5-17 wbs define code box

- **Project Code Prefix:** use this value to enter a code that will represent an abbreviation that applies to all wbs for the project schedule.
- **Sequence:** select the data type for the Code Mask to be created (ie: Numbers, Uppercase letters, lower case letters or numbers)
- **Length:** number of values for the length of the value
- **Separator:** Character symbol - . , - + or /

WBS Code Definition in 'Sell my house - ex3'

Code preview:

Project Code Prefix:

Code mask (excluding prefix):

Level	Sequence	Length	Separator
	<input type="text"/>		

☒ Generate WBS code for new task

☒ Verify uniqueness of new WBS codes

**Figure 5-18** Use the above form when defining a customized wbs code for your project schedule

Select as many lines as necessary to create your "Code Mask" and click **OK**

Below is an example of a customized mask for wbs codes:

WBS Code Definition in 'Sell my house - ex3'

Code preview:

MSP-A.1.1

Project Code Prefix:

MSP-

Code mask (excluding prefix):

Level	Sequence	Length	Separator
1	Uppercase Letters (ordered)	Any	.
2	Numbers (ordered)	Any	.
3	Numbers (ordered)	Any	.

☒ Generate WBS code for new task

☒ Verify uniqueness of new WBS codes

Help

OK

Cancel

Figure 5-19 Example of customized wbs code mask

Below is the result of the customized wbs values:



	i	WBS	Task Name	Start	Finish	Baseline Start
0		MSP-	Software Development visual reports	1/16/13	7/5/13	1/1
1		MSP-A	Scope	1/21/13	2/19/13	1/1
2		MSP-A-1	Determine project scope	1/21/13	1/25/13	1/1
3		MSP-A-2	Secure project sponsorship	1/25/13	2/5/13	1/2
4		MSP-A-3	Define preliminary resources	2/10/13	2/19/13	1/3
5		MSP-A-4	Secure core resources	1/21/13	1/29/13	1/1
6		MSP-A-5	Scope complete	2/19/13	2/19/13	2/
7		MSP-B	Analysis/Software Requirements	2/15/13	3/19/13	2/
8	✓	MSP-B-1	Conduct needs analysis	2/15/13	2/28/13	2/
9	✓	MSP-B-2	Draft preliminary software specifications	3/1/13	3/6/13	2/1
10	✓	MSP-B-3	Develop preliminary budget	3/6/13	3/11/13	2/1
11	✓	MSP-B-4	Review software specifications/budget	3/11/13	3/12/13	2/2

Figure 5-20 Display of view containing customized wbs values

When a **Code Mask** is created, the options to **Generate a new wbs** for a new task and **Verify uniqueness of new wbs codes** become available.

To renumber the tasks based on the mask values:

- Project → wbs → Renumber



Renumbering may be applied to selected tasks only or the entire project.

Be aware:

To remove a mask: delete lower level entries first and work upwards to higher levels.

After removing the mask, the wbs will not revert back to an unformatted state but will remain as the settings for the customized mask.



If wbs values are turned on as part of the task name the original non-formatted value appears and not the customized value. to turn on the wbs value as part of the task name:

From the Gantt Chart click: View → Outline number

The wbs numbers are shown below included with the task names:

WBS ▼	Task Name ▼	Duration ▼
<b>MSP-</b>	▸ <b>Sell my house</b>	<b>60 days</b>
<b>MSP-A</b>	▸ <b>1 Fix up house to sell</b>	<b>5 days</b>
MSP-A.1	1.1 Paint bedrooms & Family Room	5 days
MSP-A.2	1.2 Replace carpeting	5 days
MSP-A.3	1.3 Repair roof	1 day
MSP-A.4	1.4 Fix up completed	0 days
<b>MSP-B</b>	▸ <b>2 Clean up House</b>	<b>5 days</b>
MSP-B.1	2.1 Clean out storage space	5 days
MSP-B.2	2.2 Clean up house	5 days
MSP-B.3	2.3 Hold garage sale	2 days
MSP-B.4	2.4 Clean up completed	0 days
<b>MSP-C</b>	▸ <b>3 Hire Realtor</b>	<b>5 days</b>
MSP-C.1	3.1 Interview several realtor	5 days
MSP-C.2	3.2 Review contract	3 days
MSP-C.3	3.3 Realtor Hired	0 days

Figure 5-21 wbs numbers included as part of the task name

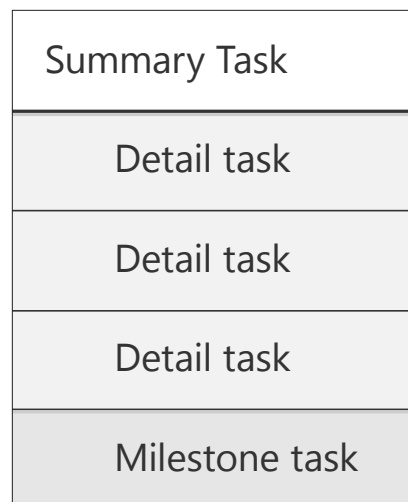
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## Guidelines for Creating a WBS

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By following some guidelines for creating your Work Breakdown Structure, you can achieve a more effective and manageable project schedule. The wbs's purpose is to help manage a project schedule. When created without guidelines, the project schedule is in danger of becoming another project.

- The wbs is not a to-do list. Are you managing tasks or are you managing a to-do checklist? Usually, tasks or deliverables are entered into the project schedule. Checklists or Work Breakdown Structure dictionaries which contain more detail of how to accomplish the tasks are kept in another location such as a Word Document, Excel Workbook or SharePoint list.
- Identify deliverables within the wbs. Work from deliverable to deliverable in the development of the schedule.
- Break the deliverables into assignable work. When the task is at too high a level, establishing the work, assignments, order and relationships between tasks becomes more difficult.
- Establish a standard design for each section of work. An example of this would be:



**Figure 5-22** Standard design example

Using this format will allow for creating high level reports (Milestone reports) easily as well as moving sections of deliverables around easily.

- A naming standard for naming tasks is helpful and establishes consistency:
  - **Summary tasks:** these names should be nouns that describe the work to be completed in the section of work.  
Examples: Location, Network design, Clean-up, Foundations, Development, Requirements. Training, Pilot, Unit Testing
  - **Detail tasks:** should be action verbs and a noun which describes the work that is to be completed for the task.  
Examples: Build test database, Review requirements, Develop preliminary budget, Create training materials, Modify code
  - **Milestones:** should be used as goal dates within a project schedule. Naming standards for milestones should be past-tense adverbs.  
Examples: Development completed, Vendors contracted, New Facility Opened, Software selected, Integration testing completed
- Every summary task should have at least two subtasks. Detail tasks and milestones can be in the wbs without being part of a summary task grouping.
- Establish maximum and minimum lengths of duration for tasks. Create a rule of thumb based on the length of each project. For example: If you have a 6 month project no task should be less than 1 day and no task will be longer than 2 weeks. Use the rule as a guide for estimating task lengths. If tasks are too long, break the work down further.
- Decide if you will be creating a wbs in the rolling wave approach. The rolling wave approach is used for schedules managing software development or any schedule where all of the details of the project are not known at the beginning of the project. Consider creating place holders for future phases of the project and elaborate the work one phase at a time.
- Deliverables: Completing a section of work means that the deliverable of that section has been accepted. Create a task for the delivery of the deliverable and create a milestone to represent the acceptance of the deliverable. The two are rarely occur at the same time.
- Level of detail. The wbs may contain as many levels of detail as you need but best practices suggest that the higher the level number the more complex the schedule becomes. Recommendations suggest that the detail is manageable using five or less levels.

- If too much detail is put into the project schedule, the schedule will become a project unto itself. The more tasks, the more work.
- Use the wbs to help manage the scope of your project. If the task isn't in the project, consider it out of scope. When you enter tasks into the project schedule, ask yourself if the task is necessary.
- When planning the wbs think about just the work of the project. Many project managers like to start thinking about who will do the work and when. It is a good idea to focus on the work of the project only and think of the work as the “what” of the project. The “who” and “when” will come as the project schedule develops.
- Having the project team or the top level resources help build the wbs for a project is a win-win for the project:
  - Increases resource buy in
  - Encourages resource contribution
  - Many eyes looking at problems from different angles
  - Less probability of missing tasks
  - Encourages team building

## Milestones

A milestone is a check point in your project. It is a status, not a task which means that it has no duration and no resources are needed. For example, an approval or sign-off before the project can proceed and the completion of a stage of the project are both milestones. To Project, a milestone is a task with a zero duration.

To enter a milestone, use the following steps:

1. Insert a new task, or click the Task Name of a blank task.
2. Type the name for the milestone in the **Task Name** field and press the **Tab** key.
3. Type "0" in the Duration field, and press the **Enter** key.

Milestones are denoted in the Gantt Chart as a diamond symbol, rather than a bar (since the milestone has no duration).

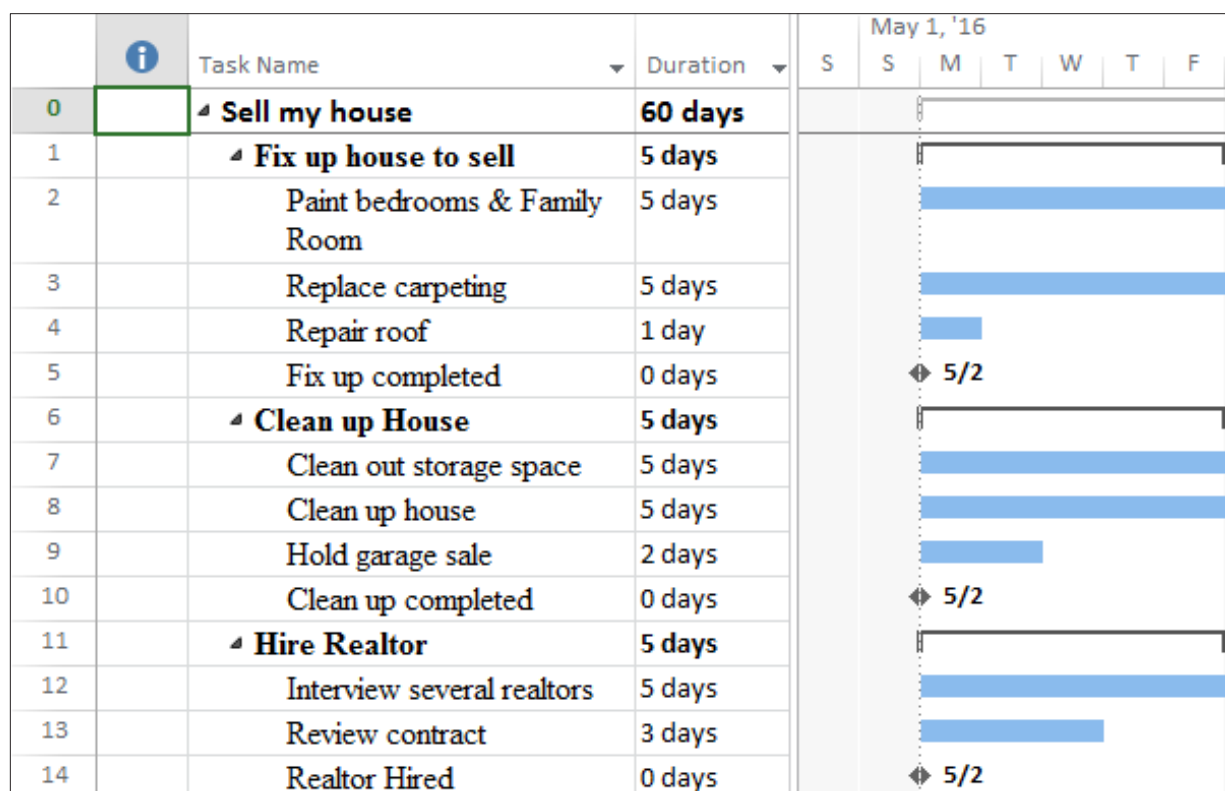


Figure 5-23 In this view tasks 5, 10 and 14 are milestones. They have a zero duration and a milestone icon on the Gantt chart.

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## Manual vs Automatic

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Project 2013 provides two scheduling methods for creating project schedules. The methods are the traditional or automatic scheduling and manual scheduling.

### Traditional or automatic scheduling

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This scheduling method was used in prior versions of ms Project and is contained in Project 2013. After tasks are entered relationships or dependencies are created between the tasks. The task durations with their relationships established the timeline for the schedule. This scheduling method allows for bottom up scheduling where the sum of the detail tasks establishes the time line for the project.

### Manual scheduling

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Manual scheduling allows for top-down scheduling where summary tasks may be added first and the details of the project work is completed later. It also permits more unknowns during scheduling process and the ability to complete the details when known. Tasks do not have to contain relationships and scheduling dates may be entered.

Project scheduling mode will be selected on a task by task basis. Manually scheduled tasks and automatic scheduled tasks may be mixed within the same project schedule. Each task will contain a column called **task mode** which will establish the scheduling mode assigned to a task.

## When to Use Manual vs. Automatic Scheduling

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Manual vs. automatic scheduling usage will deliver very different results. The amount of information concerning the project that is available to the scheduler when the schedule is created might lend the scheduler to select one method over the other when creating the initial schedule. It may be advantageous to use both scheduling methods within a schedule switching between scheduling methods when needed.

### Use Manual scheduling when

- Minimal information is available about the project and you need to put your ideas (tasks and durations) into an initial schedule.
- Tasks are assigned to specific dates and you are not comfortable with the schedule moving as other tasks are entered or as resources are assigned.
- Using top-down planning – entering duration values for summary tasks followed by detail tasks and milestones to complete the work of the summary tasks.
- Using free form planning of tasks and durations to produce a Gantt chart.
- Need to build a rough schedule for a future project
- Relationships between tasks are not known.

### Use Automatic scheduling when

- More complete information is known about the goals of the project.
- Using bottom up planning. Enter the summary tasks and create wbs structure. The detail tasks within the summaries will calculate the duration of the summary tasks.
- You want the schedule to be dynamic. Tasks will be adjusted reacting to changes within the schedule.



- You want the scheduling engine to calculate dates in the schedule.
- Resource allocations, resource assignments based on hours, earned value and more accurate metrics are needed.

## **Consider using a combination of both methods when**

- Initial planning may be in manual mode. As decisions are made and more detail is known, tasks may be converted to automatic mode.
- Consider converting to automatic mode when project execution begins. This may be done for the entire project, by phase or range of tasks.

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## **Project Live Cycle Approach**

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## Change to Auto Schedule

The column or field in Project 2013 that determines which scheduling mode a task will be scheduled by is called “Task Mode”. By default, you will see this field on the Entry table of the Gantt Chart. This column may be added to any task table.

Setting the automatic or manual scheduling mode may be accomplished in several ways:

To set the scheduling mode for a project or for all future projects:

- **File → Options → Schedule**

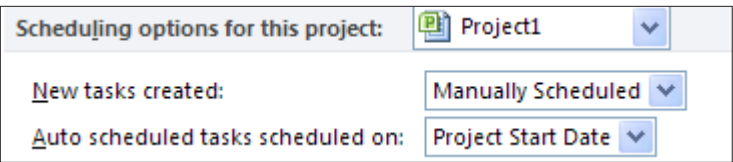


Figure 5-24 PLACEHOLDER

After several tasks are entered you may decide to switch to a different scheduling mode for the addition of future tasks for the project. This can be done quickly using the choice option at the bottom left hand corner of the Gantt Chart view which is shown below. Changing this option will not affect existing tasks in the schedule; it will only affect future added tasks. Click on the button highlighted below for the option to change scheduling modes:

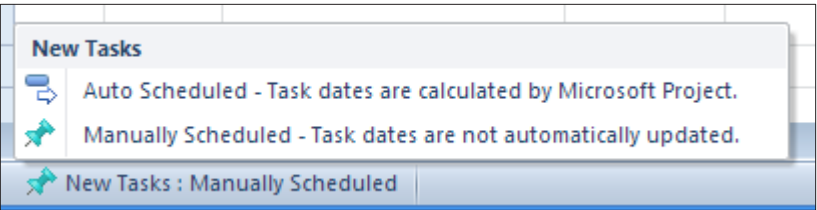


Figure 5-25 PLACEHOLDER

The default Entry Table for the Gantt Chart includes the “Task Mode” column inserted to the left of the Task Name column. This column may be inserted into any table as needed.. The indicators in this column indicate the scheduling mode for the task. In the view below the automatically

scheduled tasks have a icon and the manually scheduled tasks have a icon in the Task Mode column. Hover your mouse pointer over the icon and the scheduling mode description will appear. Clicking on the icon will allow for scheduling mode changes per task. Note the different Gantt bar formats for manual v automatically scheduled tasks.

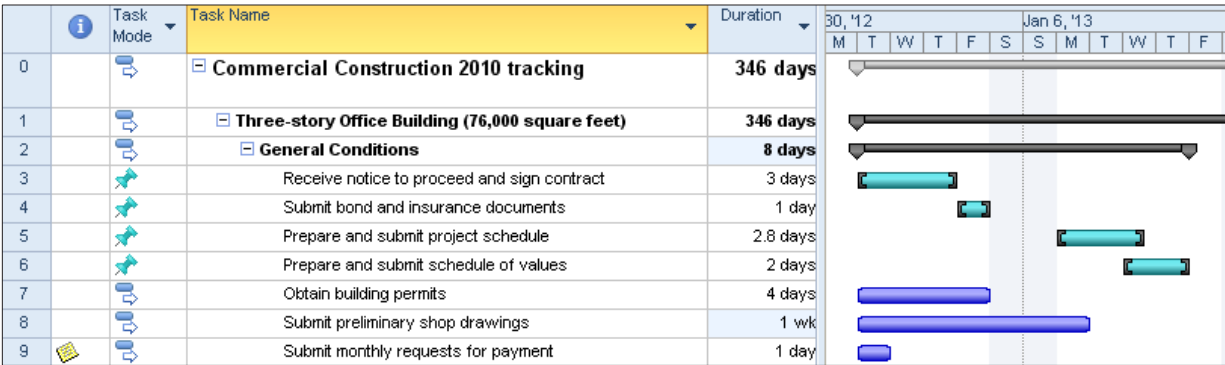


Figure 5-26 PLACEHOLDER

- To change the scheduling mode from the Task ribbon:
- Click task to be changed
  - Click **Task** → **Manual Schedule** or **Automatic Schedule**

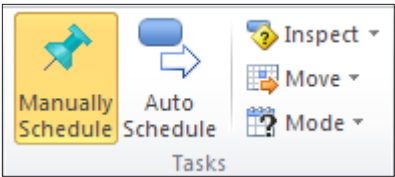


Figure 5-27 PLACEHOLDER

Another way to change the schedulig mode is to double clicking a task to open the Task Information dialogue box. An option is located on the General tab to change the scheduling mode. The options are highlighted in the view below.

**Task Information** [X]

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name:  Duration:  ☐ Estimated

Percent complete:

Schedule Mode: ☐ Manually Scheduled ☒ Auto Scheduled

Priority:  ☐ Inactive

**Dates**

Start:  Finish:

☐ Display on Timeline  
☐ Hide Bar  
☐ Rollup

Figure 5-28 PLACEHOLDER





## Chapter 6

# **Estimating, Linking and Lead and Lag**

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## Overview of Estimating

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Estimating is the ability to make an educated guess as to the duration, work or duration and work of a task. It is an art to know how long a task will take and how many resources are required and of what skills are required for a task.

## How Project 2013 Defines and Calculates Work and Duration

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It would be helpful to understand the formula that will be driving the scheduling of the tasks before you enter your estimates:

Work = Duration \* Units (quantity of a resource)

OR

Duration = Work / Units (quantity of a resource)

## Estimating Techniques

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- **Top down estimating:** used when performing the same types of projects frequently. Top-down estimating allows for estimating the length of a phase. The details for tasks will follow. Manual scheduling mode in Project 2013 allows for this type of estimating model.
- **Bottom up estimating:** estimating each task work package or deliverable of the project (this could be at the task level) will allow for the accumulated roll up of the values to create the length of the project. The roll up will accumulate at the summary task levels as totals for



duration, work and cost. In turn, the summary tasks will roll up to the project summary task for a grand total for the project.

## What to Estimate?

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- Estimate duration (length of time) in minutes, hours, days, months, etc.
- Estimate work (amount of work) in minutes, hours, days, months, etc.
- Estimate duration and work in minutes, hours, days, months, etc.

## Where Do the Estimates Come From?

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Estimates may come from the project manager, team members, subject matter experts, stakeholders, historic data, experience, etc.

## How Do You Get Good Estimates?

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**Ask the right people:** look for the most experienced person in a specific skill area. Chances are, they have worked a project similar to or have actually performed the work in the past. These types of people can be invaluable to a project manager for estimating.

**Ask the performing resource:** if you are lucky enough to know who your resources will be for the project, the performing resource is always the best source for an estimate. However, how you ask the resource for

the estimate will make a difference. If you ask for an estimate, most people are thinking about fitting the work into their current workload. Framing the question from the point of view that the project will be worked some time in the future will result in a more accurate response. They should only consider how long (or how much work) it would take to perform the task regardless of the specific timeframe.

**Ask more than one person:** seeking various points of view for estimates will help define what the best estimate is. Project 2013 has an add-in feature called **PERT** which allows for 3-point estimates for task durations. The 3 points are pessimistic, most likely and optimistic. These values are feed into a formula that will result in an estimated duration of a task. The result will be three Gantt Charts: Pessimistic, Optimistic and Most likely.

**Subject Matter Experts:** always a good source for advice.



Padding, slack, and time reserve should be included in any schedule. Every organization and project management methodology has its own approach. The important point is that extra time should be built into all schedules to help manage the inevitable contingencies that will occur during the performance of all projects. If padding, slack or time reserves are not included in the planning, the schedule will not be realistic and will result in a reduced probability of completing the project as planned.

## Entering Estimates

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The Entry table of the Gantt chart is designed for easy entry of task estimates. Adding the work column to the view will enable adding Work estimates.

To insert the work column in to the Entry table of the Gantt Chart view:

1. **Tasks → Gantt Chart** (the default value will be the Entry table)
2. Right click on the column heading **Start**
3. Select Insert Column
4. Click on the “W” key on the keyboard
5. Click on **Work**
6. Click ok to close the box

For each task enter:

- A duration value

- A work value
- A duration and a work value

Valid entry values:

- 1m = 1 minute
- 1h = 1 hour
- 1d = 1 day
- 1w = 1 week
- 1mo = 1 month
- 1 y = 1 year



Abbreviations of the time values may be customized in the Schedule options:

**File → Options → Schedule**

Duration entries will be scheduled as work days as defined by the project calendar.

Physical days (actual day count including non-working days) may also be achieved by using the **Elapsed** time. By placing an “E” in front of the letter in the duration field, the value will be scheduled in physical number of days. For example: 13 ed = 13 physical days.

In the example below, Task 1 is scheduled as business days (using the project calendar) and Task 2 is scheduled as physical days. Note the scheduling difference:

	i	Task Mode	Task Name	Duration	Start	Finish	Jul 7, '13														Jul 14, '13															
							4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19														
1			Task 1	10 days	7/5/13	7/18/13	[Gantt bar from 7/5/13 to 7/18/13]																													
2			Task 2	10 edays	7/5/13	7/15/13	[Gantt bar from 7/5/13 to 7/15/13]																													

Figure 6-1 PLACEHOLDER

Other helpful information:

- When task durations are entered, a “?” will be added within the duration field. This “?” represents that the task information has not been finalized and considered estimated. This indicator is optional and may be turned off at **File → Options → Schedule** and un-checking the following options:
  - Show that scheduled tasks have estimated durations
  - New scheduled tasks have estimated durations

- Some project managers plan all tasks in fixed duration. It should be noted, that fixed duration tasks will be tied to calendar dates and might be more difficult to schedule and track in the future.
- Manual scheduling mode for a task has the benefit of not requiring values in duration, start and finish columns. Text may be added as a note to the scheduler. If the task mode is changed to automatic scheduling, the text will be lost and, the software will enter a valid values. Scheduling modes are discussed in *Manual vs Automatic* on page 107. In the view below note the values in the duration, start and finish columns for Task 2:


		Task Mode ▾	Task Name ▾	Duration ▾	Work ▾	Start ▾	Finish ▾	
1			Task 1	10 days	0 hrs	7/5/13	7/18/13	
2			Task 2	ask Bob	0 hrs	unsure	future	

Figure 6-2 PLACEHOLDER



Inserting **Effort-driven** and **Type** columns will allow for setting these values for each task as well. As discussed in Chapter 4, *Start a Project*, each task will be unique in the nature of the work to be performed. As a result, these settings should be adjusted to determine what task type and effort-driven values are appropriate for a task.

## Estimating for Unknown Resources

Most project managers plan the work for a project and find out what specific resources will perform the tasks in the future. Tasks might require a specific skill level but the quality of the unfamiliar resource is unknown. How do you plan for unknown resources?

When estimating tasks, consider estimating a task for a senior level resource or a junior level resource:

- The senior level person would accomplish the task faster and would cost more.

- The junior level resource would cost less but needs more time and training.

**Outsourcing resources:** although there is a quantity of highly qualified contract resources, the recommendation is to estimate these tasks at the junior level. You will need to account for learning curve, assimilation into your organization and ramp up. The project manager might request a specific skill level but it is unknown whether or not that skill will be available when the project requires it.

As mentioned earlier, the PERT estimating method could give a 3 point duration estimate. Using PERT will result in 3 different reports; an optimistic Gantt Chart, a pessimistic Gantt Chart and an expected Gantt Chart. The PERT estimating module is an add-in in Project 2013 and is available at no cost as a download from Microsoft.

## Add Elapsed Time

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## Duration, Work, or Duration & Work

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## Types of Durations

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## Concept of the Scheduling Engine

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Dynamic scheduling is the use of task relationships and dependencies to drive the sequence and ultimately the timing of the schedule. Project's scheduling engine support dynamic scheduling.

This means that as you make adjustments to certain tasks as the project progresses Project automatically recalculates the effect on subsequent tasks. This will also show the project manager if the overall schedule is extended and provide analysis opportunity to monitor if the change creates multiple critical paths, potential resource constraints, and so on.



Project will also highlight those tasks affected by a change so the project manager can easily see the ripple effect of the current proposed task changes. With the 99 levels of undo in Project 2013, a project manager can also utilize this highlighting feature to conduct Monte Carlo, or What If, analysis to analyze multiple scenarios of task adjustments to the schedule.

If constraints are utilized to lock in task dates this disables Project's built-in scheduling engine and a project manager will not be able to see the effects downstream in the schedule. Maintaining this dynamic visibility is vital in effectively and proactively managing a schedule. This is why it is a best practice to not use constraints, unless necessary and appropriate to the task.

## Linking

### Task Dependency Types

Project 2013 allows for 4 types of task dependencies. These dependencies establish the order that the tasks will be performed. Dependencies may also be referred to as links, relationships or relationships between tasks. The result of creating task relationships is a network of related tasks establishing a time line. When referring to linked tasks the following terms will apply:

- A task that has a relationship directly before a task is known as a predecessor task
- A task that has a relationship directly after a task is known as a successor task

In the view below there are 4 tasks. The relationships are established as link lines between tasks.

- The predecessor task or task that comes before Task B is Task A.
- The successor task or task that comes after Task B is Task C.

Pointing to a link line between tasks will reveal information regarding the relationship between tasks. See the highlighted box below which is showing the details of the relationship between Task C and Task D.

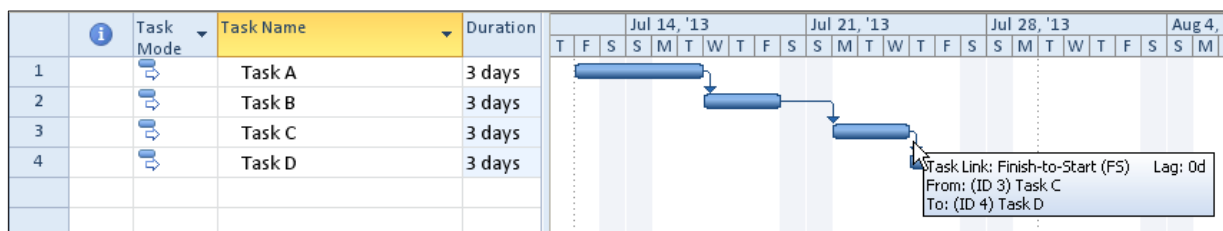


Figure 6-3 PLACEHOLDER

Not all dependencies are the same. Some tasks will start at the same

time where others might be schedule one after the next. To facilitate scheduling needs, there are 4 dependency types which are:

- Finish-to-start
- Start-to-start
- Finish-to-finish
- Start-to-finish

The details of each of the relationship types is described below:

- Finish-to-Start (fs)
  - Default dependency for the Project 2013
  - Task 1 must complete before Task 2 can begin
  - This relationship type creates a waterfall effect
    - Example: Drive to the restaurant, then eat dinner
    - Build a wall then paint the wall

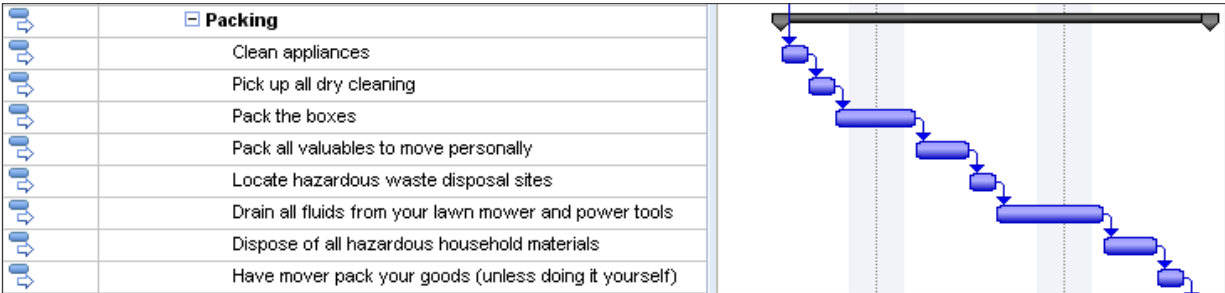


Figure 6-4 PLACEHOLDER

- Start-to-Start (ss)
  - Tasks that are scheduled to start at the same time
    - Example: After the moving expenses are calculated, then determining the best moving method, create a moving-ex-penses file and create a moving binder may all start at the same time. All 3 tasks should be completed (in this example) to pass the milestone and move on to the next section of work. It should also be noted that the 3 tasks that are starting at the same time are not scheduled to complete at the same time. As a result, the longest task will determine when the milestone will be scheduled.



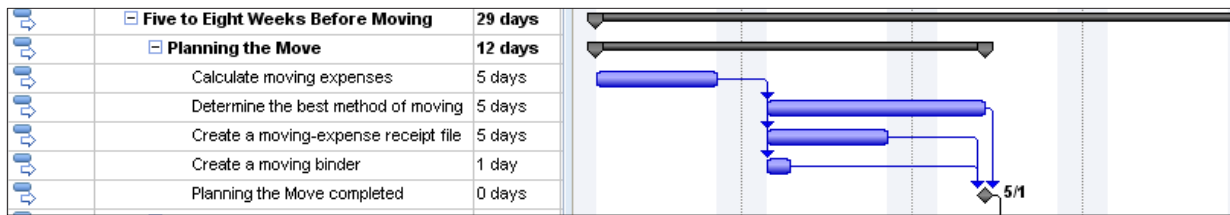


Figure 6-5 PLACEHOLDER

- Finish-to-Finish (FF)
  - Tasks that are scheduled to finish at the same time but not required to start at the same time.
  - Example: The section of work below can all start when the previous section is completed. These tasks will start at different times, but they all need to be completed by the same point in time.



Figure 6-6 PLACEHOLDER

- Start-to-Finish (SF)
  - The start date of the predecessor task will determine the finish date of the successor task.
  - This is the least used dependency type and rarely used.
  - Example: When the new software module comes on line, the old software will be taken off line



When working with manually scheduled tasks, errors might result using dependencies. A warning is viewed when tasks are linked and dates are entered into the start or finish columns. The calculation of the project duration might not match the duration calculated when the entered dates are taken into consideration. Below is an example of an error created when a date was entered in the start column for Task B. The error is represented by the red line under the incorrect date and the dots around the Gantt bars.

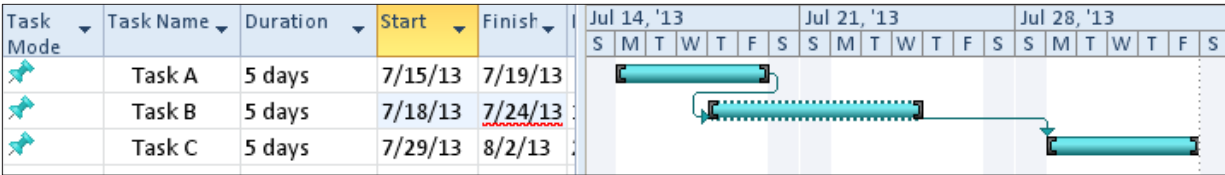


Figure 6-7 PLACEHOLDER

To correct this type of error, Project 2013 has a new feature called Respect Links. Right click on the red error line and following choices appear. Select the Respect Links option and the date will be recalculated based on the task relationships.

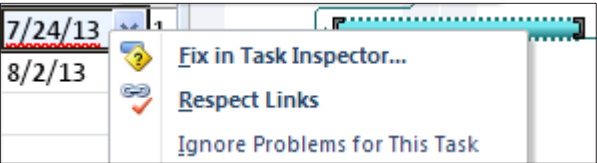


Figure 6-8 PLACEHOLDER

Below is the result of clicking on the Respect Links option for the task. Note the error message is no longer visible and the task in error has been rescheduled.

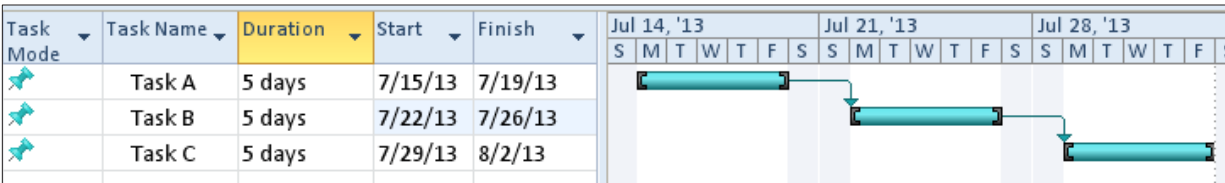


Figure 6-9 PLACEHOLDER

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## Best Practices for Using Dependencies

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Project 2013 calculates the duration of a project based on how task dependencies are created between tasks. Establishing the order of the tasks is called Sequencing. Sequencing is concerned with establishing the order tasks should or could be performed. Arranging tasks in the most efficient order for the project is not an easy exercise. Sometimes, the order of the tasks is very evident and at other times, more complicated. Sequencing is more option than right or wrong for a project.

For example, the following tasks are tasks that someone would do when they come home after work and before they go to bed:

1. Arrive Home
2. Eat Dinner
3. Walk the dog
4. Run an errand
5. Read the mail
6. Clean up the dinner dishes
7. Cook dinner
8. Go to Sleep
9. Get the mail
10. Watch the news

Take a minute to write down the numbers of the tasks above in the order you would perform these tasks.

Things you might notice:

- You will have some forced relationships:
  - You can't eat dinner until you make dinner
  - You can't read the mail until you get the mail
- You will also notice that Arrive Home and Go to Sleep are the start and finish of the sequence.
- Some tasks can occur at any time and are not dependent upon another tasks
- Some tasks you might consider doing differently, like picking up dinner on the way home. It would accomplish the same purpose and save time.
- Can any tasks be done at the same time as other tasks to save time?
- Should any tasks be eliminated?

Next rework this same sequence of tasks knowing that someone else will help perform the tasks. Does it turn out differently? Would it take less or more time? Some tasks you have to do yourself and some tasks can be performed by someone else.

Best practices to consider when creating dependencies:

Relationship between tasks will allow you to create network of related tasks. The network will show order the tasks will occur. Below are some best practices which should be considered when creating relationships:

- All tasks should have both a predecessor and a successor. The timeline for the project is based on this concept. If tasks are not linked in the network of tasks, their duration will not be accounted for within the timeline. Making sure all task durations are accounted for will avoid surprises at the end of a project.
- When creating dependencies or relationships, apply the rule – because I can, is it a good idea? Do not link every task to every other task. In the example above, should you should have linked Arrive Home with Go to Sleep with the logic of if you don't come home, you can't go to sleep? The answer is no. Only the last task that is completed before Go to Sleep should be linked to Go to Sleep.
- Think about what task pushes or influences another task. If a task is late, what other tasks will be affected? Link only tasks with a direct affect on a successor task. Ask yourself what needs to be completed before you can do the next step and if it is late, which tasks will be affected.
- Link detailed tasks and milestones only. The completion of tasks will push the milestones or the short term goals. Linking summary tasks means that an entire section of work must be completed before the next section may be started. Ask yourself if that is true for your situation before linking at the summary level. Linking summary tasks is not recommended.
- Tasks should always be linked to push milestones. For example: define what the definition of “project completed” is. The multiple parallel paths that must be completed to conclude the project should all be linked to the ending milestone. If any of the parallel paths take longer than planned, the milestone date will be pushed out in time.

In the example below “Start the Project” is the starting milestone. The next 3 sections of work all start when the project starts. All 3 sections must be completed before the house is ready to sell. If any of the sections take longer, each section has the ability to push the ending milestone or when the house is ready to sell. The longest of the parallel

paths will be considered the critical path or the section that determines the timeline of the project.

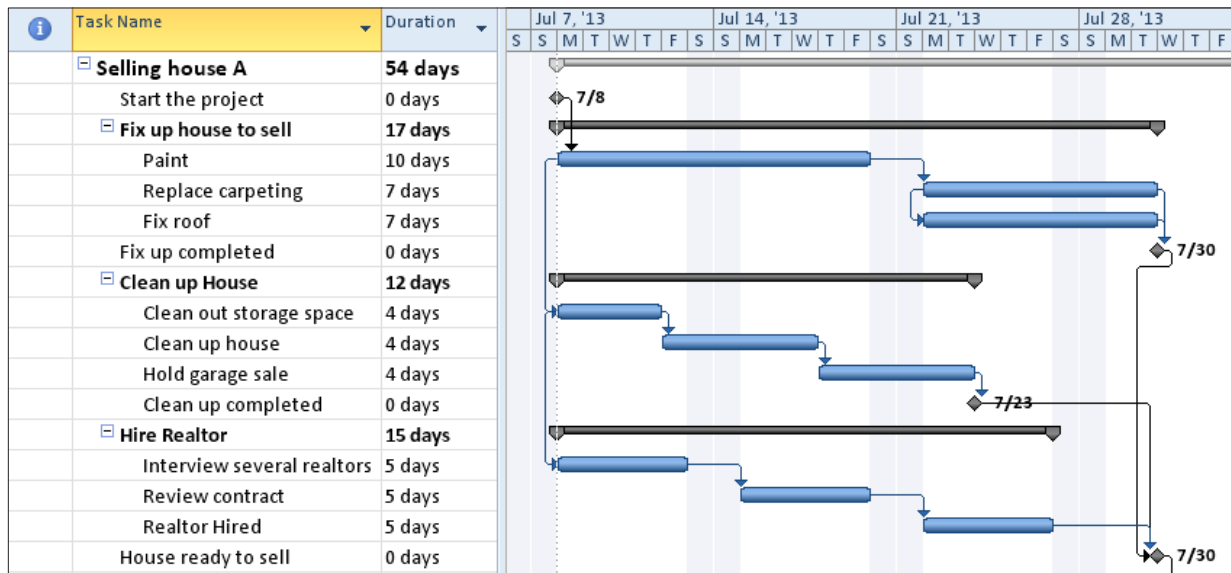


Figure 6-10 PLACEHOLDER

- Create as many parallel paths as possible to shorten the schedule. Use of the Start-To-Start and Finish-To-Finish relationships will help create parallel paths and shorten the project time line. Be aware, however, just because you can schedule tasks in parallel, you might not have the resources to perform the work and which could extend the timeline.
- Do not link tasks based on a resource. Some people will plan tasks to occur at specific times because they think that a resource will be available at that time. Chances are the expected resources will not be available at the planned point in time because other tasks for that resource have changed. Plan the schedule for the work required and plan/arrange for required resources as the time draws nearer to when the task will be performed.
- Links may be external to the project. Project 2013 will allow dependencies to exist in other projects that are linked to tasks in your project. This is similar to links in Excel. In Excel, if links between files are created and the files are relocated, the links will be broken. Project 2013's links between project files will work the same way.



Project 2013 also offers the option for tasks that are moved or added to the schedule to automatically link in a Finish-to-Start relationship or not be linked at all. This is a personal preference and may be applied to a specific project or all projects viewed on your desktop.

To view or change this option: **File → Options → Schedule**

Scheduling options for this project:

Home Move.mpp

New tasks created:

Auto Scheduled

Auto scheduled tasks scheduled on:

Project Start Date

Duration is entered in:

Days

Work is entered in:

Hours

Default task type:

Fixed Units

☒ New tasks are effort driven

☒ Tasks will always honor their constraint dates

☒ Autolink inserted or moved tasks

☒ Show that scheduled tasks have estimated durations

☒ Split in-progress tasks

☒ New scheduled tasks have estimated durations

☒ Update Manually Scheduled tasks when editing links

☐ Keep task on nearest working day when changing to Automatically Scheduled mode

Figure 6-11 PLACEHOLDER

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## Lead & Lag

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Relationships between tasks are not always absolutely defined as described with relationships. Allowing for Lead and Lag time will help refine a schedule to bring it more in line with the actual timeline for the project. Lead and Lag time will allow for wait time between tasks and overlap of task activities.

In this Lesson we will discuss:

1. What is Lag time?
2. What is Lead time?
3. Best Practices for using Lead and Lag time

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## What is Lag Time?

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Lag time is used to provide wait time between tasks. The time will be expressed in business days or valid project calendar working time. Lag time should be used to extend the timeline of the project when only duration needs to be added to a schedule and will not add work or cost. For example: New concrete is poured and you must wait 6 days before you can drive on it. The time must occur but no work or cost is added to the task. A dependency must first exist between tasks before Lag time can be created.

To create Lag time:

Double click the relationship line between tasks where you would like to add the lag time. The task dependency dialog box below will appear. In the illustration below, we see that there are 2 tasks. After the equipment is ordered there will be a 2 week delivery wait time before the equipment is received. To create this wait time, set the Lag field to 2w (2 weeks). Click **OK**.

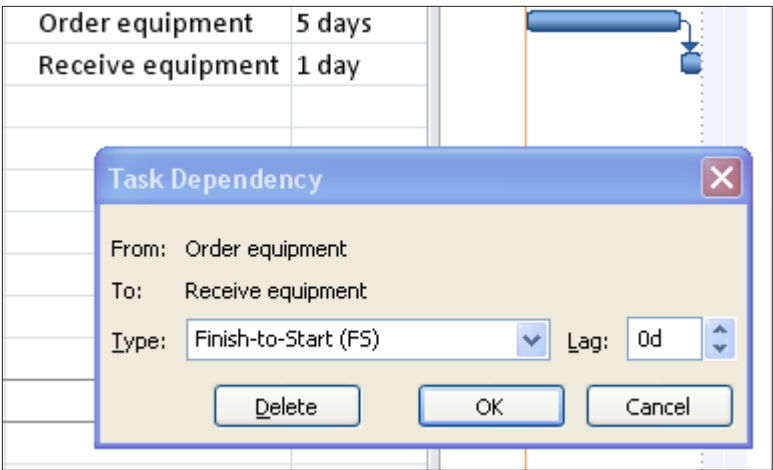


Figure 6-12 PLACEHOLDER

The result is of adding a 2 week lag shown in the illustration below.



Figure 6-13 PLACEHOLDER

An alternate method of entering lag time is by adding the value of the lag into the predecessor column as shown below:

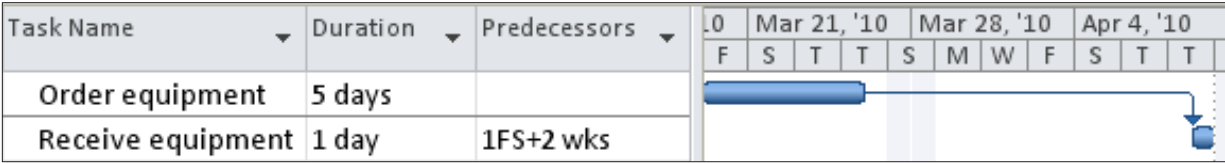


Figure 6-14 PLACEHOLDER

Lag time may also be expressed as a percentage of the duration of the predecessor task. Order equipment is a 5 day task. 50% Lag would mean that the length of the lag time would be 2.5 days or half of the 5 days duration of the Order equipment task.



## What is Lead Time?

Lead time shortens the time line of the project. Consider tasks that do not need to be 100% completed before the successor task can start. Lead time is a good tool to help refine the schedule when trying to cut time from a timeline. Project 2013 does not have a field or box called Lead time. Instead, to create Lead time negative Lag time is entered.

To create Lead time:

The diagram below allows 10 days to unpack equipment and 10 days to set up the equipment. The same resources are performing both tasks. The 2 tasks together will require 20 days to complete if the equipment was set up after all of the equipment has been unpacked. If you had more resources to work on the tasks could you get these tasks accomplished quicker? In the example below the task to set up equipment will be scheduled to start when the equipment is half unpacked.

Below is a view of the tasks before lead time is entered. The tasks are scheduled for 20 days of duration.

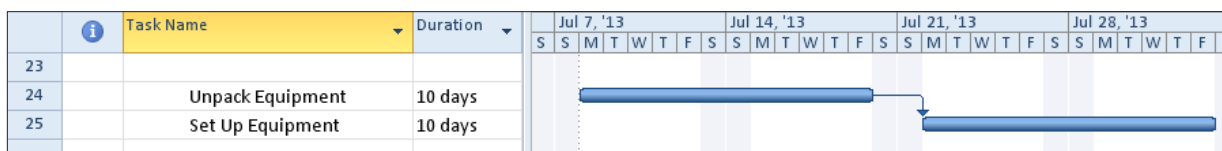


Figure 6-15 PLACEHOLDER

To enter Lead time between two tasks:

- Double click the relationship line between tasks where lead time is to be added.
- Enter “-5days” in the Lag field value
- Click ok to close the box

The task dependency dialog box shown below will appear.

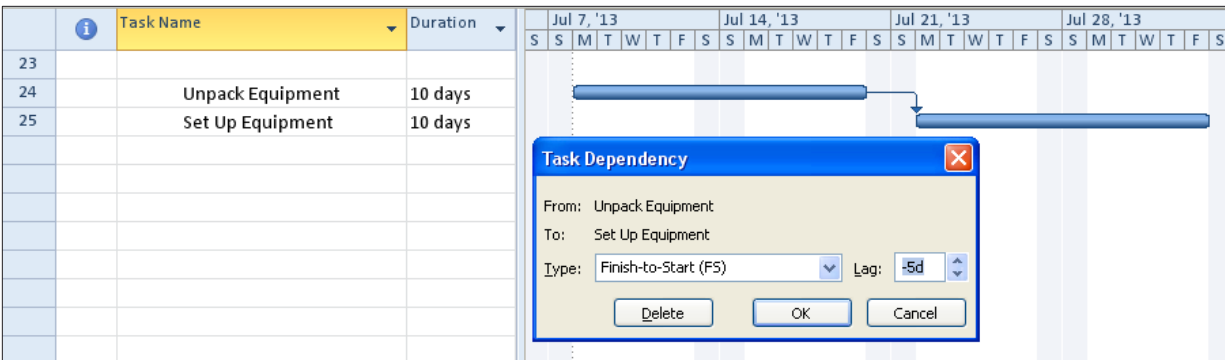


Figure 6-16 PLACEHOLDER

Below is the result of adding lead time between two tasks. Note the overlap of tasks and the total scheduling time has been shortened.

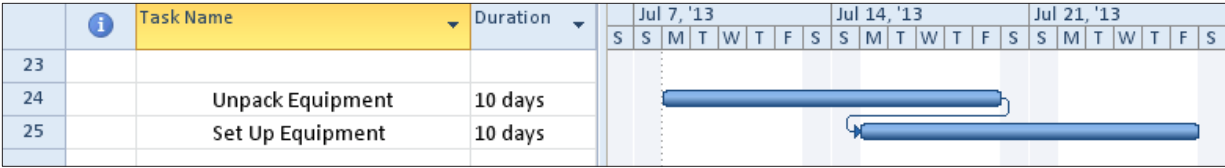


Figure 6-17 PLACEHOLDER

Lead time can also be expressed in percentages. The advantage to using percentages is if the predecessor task length changes, the successor task will automatically adjust its starting date.

For example:

- Task A is 10 days long and has a Finish-to-start relationship with Task B with -50% lead time
- Task B will be scheduled to start when Task A has 5 days of work completed
- Task A is taking longer than expected and is now scheduled to take 15 days
- Task B will be rescheduled to start when Task A has 7.5 days of work completed.

A -50% would move the successor task to the left 50% of the duration of the predecessor task. The diagram below demonstrates the result of applying -50% for Lead time to the relationship between these two tasks.

To enter Lead time between two tasks as a percentage value:

- Double click the relationship line between tasks where lead time is required.
- Enter “-50%” in the Lag field value
- Click ok to close the box




	 Task Name	Duration	Predecessors	Jul 7, '13							Jul 14, '13							Jul 21, '13						
				S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
24	Unpack Equipment	10 days																						
25	Set Up Equipment	10 days	24FS-50%																					

Figure 6-18 **PLACEHOLDER**

## Best Practices

Use Lag time when extending the timeline without adding cost or work to the project.

Best practices for the use of **Lag** time in a project schedule:



Time must go by without a work or cost applied to the time. Lag is considered to be wait time like a delivery of equipment or concrete hardening



Adding slack into the schedule to extend the timeline to allow for possible contingencies



Adding wait time between phases of a project



Adding wait time between parallel sections of a project to allow others to catch up



Lag time may also be expressed in elapsed time to allow nights and weekends to be included



Planning the work for a factory crew. For example: the crew needs to be at work for 9 hours but 8 of that is actual work. The remaining hour is meal and breaks. Use Lag to extend the time for the work of the crew to accommodate breaks.

Use lead time when the schedule needs to be shortened. More resources will be needed to accomplish the tasks. Lead time can increase risk of re-work and could increase cost for tasks.

Best practices for the use of **Lead** time in a project schedule:



Piece work – when X number of items or time has been completed, giving the completed work to the next group to start their work.



Testing – when X percentage of the testing is completed and successful, giving the completed work to the next group to start their work.



When it is not necessary for the predecessor task to achieve 100% completion before starting the successor task.

## Inactivate Tasks

When developing a schedule or even after a schedule is being executed, you may have portions of the schedule that may be optional or you may be looking for ways to run a scenario which leaves out a portion of the schedule from the scheduling engine. Choosing to inactivate a collection of tasks is a way to temporarily or permanently remove tasks from the rest of the schedule, but still leave the information about those tasks intact so you can reactivate them at a later time as desired, or keep this inactive data for historical purposes. This feature saves time over having to delete and re-enter task information. All tasks by default are active unless you make them inactive.



This feature is in Project Professional 2013 only.

To inactivate a task:

1. Select the task(s).
2. On the **Task** tab, **Schedule** group, click **Inactivate**.

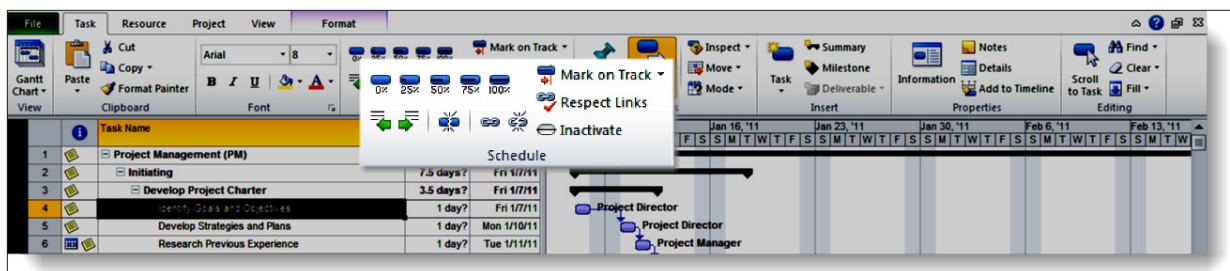


Figure 6-19 Project Ribbon – Inactivate Task



If you made a mistake and accidentally inactivate the wrong task(s), simply click **Inactivate** again to make them active.



This feature is especially useful when you are struggling with test/retest cycles. Simply inactivate the extra cycles until they are needed.



Inactive tasks are a great way to include contingency actions which only apply if a planned risk actually manifests itself in the future.



## Chapter 12

# **Printing and Reporting**

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## Printing

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Most of the print settings in Project 2013 are similar to other Microsoft Office products. Unique to Project 2013 is the ability to include project and task data in report titles using the header and footer options. Printing Gantt charts on paper or using Gantt charts in presentations will also be discussed in this lesson.

In this lesson, we will discuss:

- Print Settings
- Define Page Setup
- Copy Picture

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## Print Settings

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Project 2013 gives you the ability to customize how a report will be printed. Seeing the final report before it is printed assures the user that they are printing the correct report. Print options allow the user to select a printer and fine-tune which data will be printed. When the print options are selected, the current active project view will be printed.

To display print settings options view:

- File → Print

To close print settings options view:

- Click any tab above the ribbon bar

Below is a view of the print option screen. When the options were selected, the Gantt Chart was the active view. On the left side of the view, several options are available:



Table 12.1 PLACEHOLDER

Option	Action and result
Print	Sends the report to the selected printer.
Copies	Determines the number of copies that will be printed.
Printer	Clicking the arrow on the right side of the box will open a drop-down menu and display all available printers.
Printer Properties	Clicking on the link will display additional printing properties.

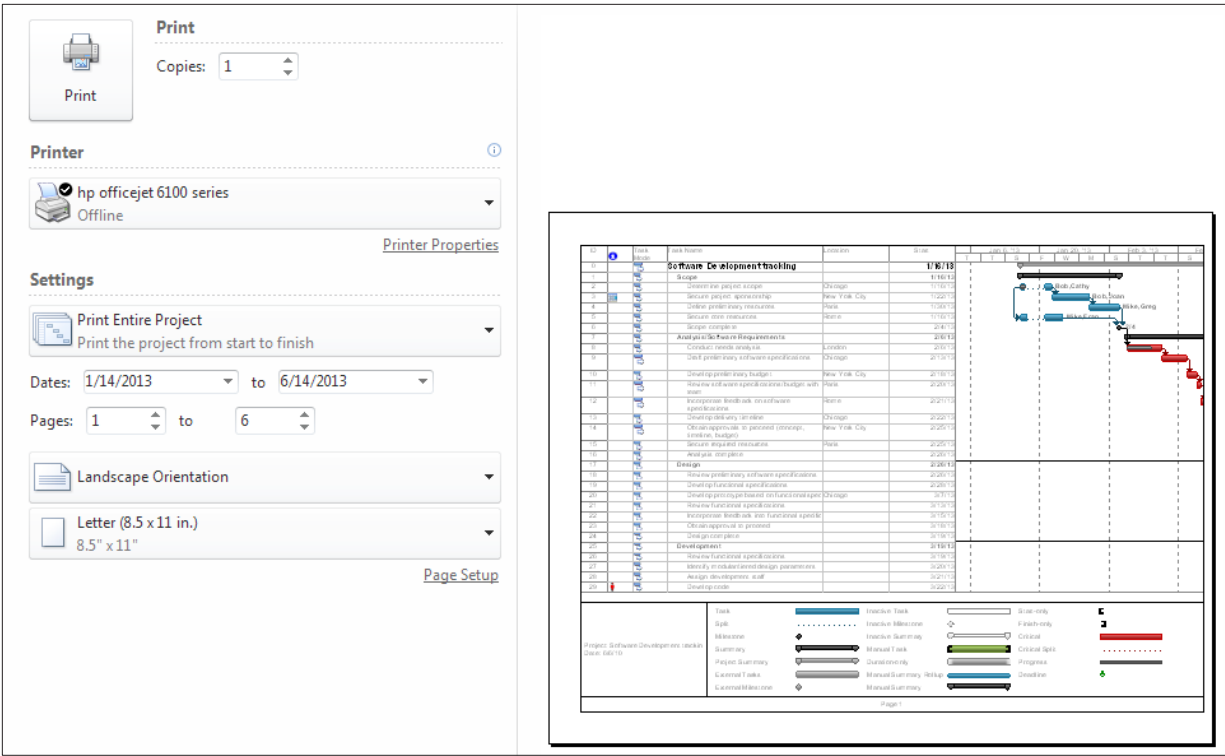


Figure 12-1 PLACEHOLDER

Click the down arrow on Settings to display more options to further refine the final printed report. These options are:

Table 12.2 PLACEHOLDER

Option	Action and result
Print Entire Project	Default value. The entire project schedule will be printed using the current view.
Print Specific Dates	Only the data between the date range will be printed. This option is not available for all reports.

Table 12.2 PLACEHOLDER

Option	Action and result
Print Specific Pages	Select specific page numbers to print.
Print Custom Dates and Pages	Date range and page number range will be printed.
Notes	Add the project notes to the printed report. Notes will be printed on a separate notes page.
All Sheet Columns	When selected, all columns within the current view will print.

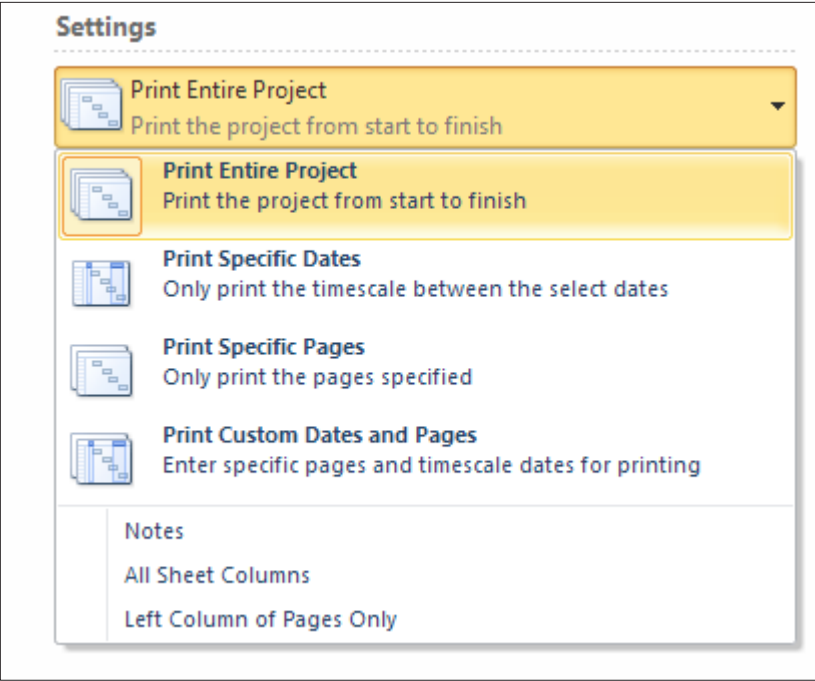









Figure 12-2 PLACEHOLDER

Page orientation and paper size options are also available.

Viewing options to preview the final report are available by clicking on the buttons below the active project view in the lower right corner of the screen. The buttons are shown below.

Table 12.3   **PLACEHOLDER**

Button	Represented by	Result
Left arrow		Move one page to the left.
Up arrow		Move one page up.
Down arrow		Move one page down.
Right arrow		Move one page to the right.
Actual size view		Actual size of printed report. Use sliders to see the entire page.
One page		Report will show one page at a time.
Multiple pages		Report will show in multiple page format.

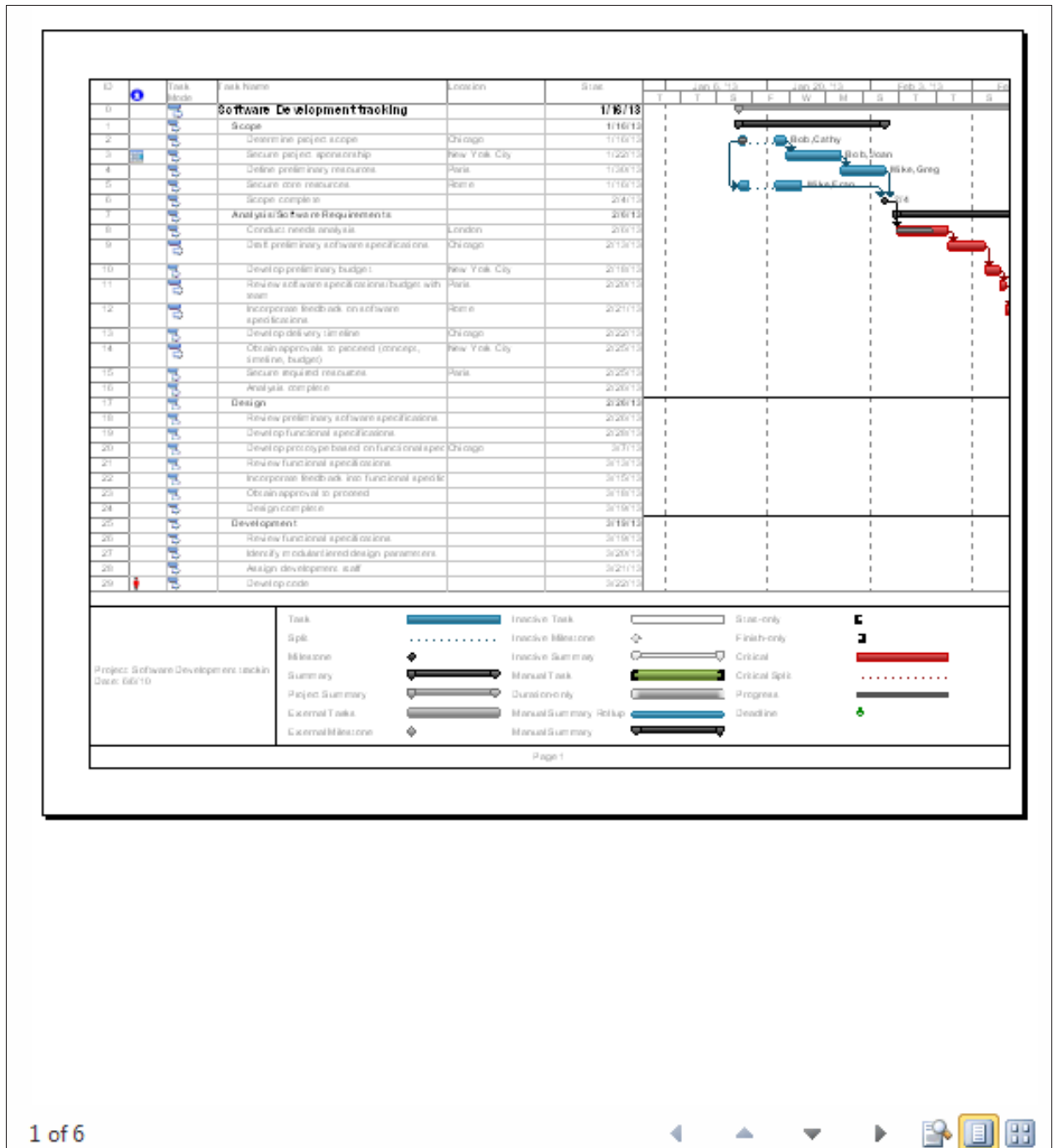


Figure 12-3 PLACEHOLDER



Add the Print Preview button to the Quick Access Toolbar:  
Click on the down arrow on the right side of the Quick Access toolbar  
Select **Print Preview**

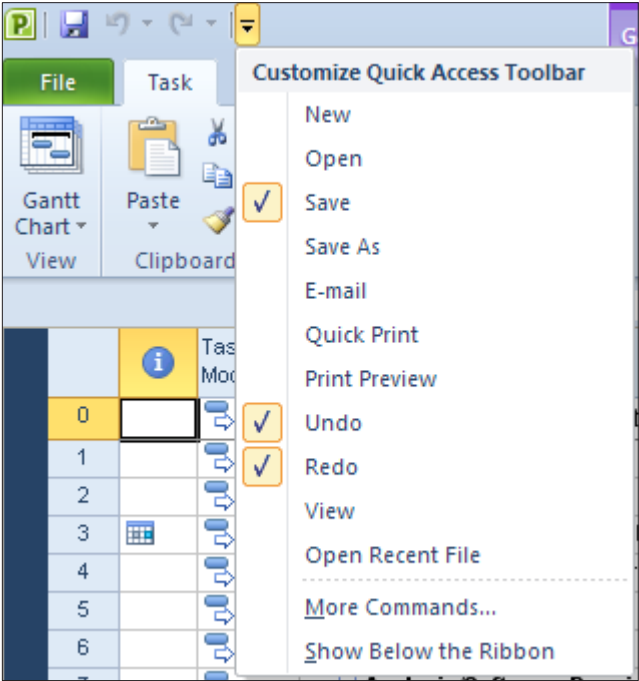


Figure 12-4    **PLACEHOLDER**

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## Page Setup: Header, Footer, Note Print Option

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### Define Page Setup

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Page setup options are similar to options available in other Microsoft Office products. Project 2013 has some unique options specifically for the types of views available in the application. These unique options will be discussed in this lesson.

Project level data may be entered for project name, author, company, etc. and applied to the project header and footer information. This information is entered using the Advanced Properties dialog box. Once the data has been entered, the header and footer information is configured per report using the Page Setup options.

To add information in the Advanced Properties dialog box:

- File → Info → Project Information → Advanced Properties

The dialog box is shown below:

The screenshot shows a Windows-style dialog box titled "Software Development tracking.mpp Properties". It has a blue title bar with a question mark icon and a close button (X). Below the title bar are five tabs: "General", "Summary" (which is selected and highlighted with a yellow background), "Statistics", "Contents", and "Custom". The "Summary" tab contains several text input fields and a checkbox. The fields are labeled as follows: "Title:" (containing "Software Development |"), "Subject:" (empty), "Author:" (containing "Ellen Lehnert"), "Manager:" (empty), "Company:" (containing "Organization Name"), "Category:" (empty), "Keywords:" (empty), "Comments:" (empty), and "Hyperlink base:" (empty). Below these fields is a "Template:" label followed by the text "Software Development". At the bottom of the form area is a checkbox labeled "Save preview picture" which is currently unchecked. At the very bottom of the dialog box are two buttons: "OK" and "Cancel".

Figure 12-5 **PLACEHOLDER**

To display the Page Setup dialog box:

- File → Print → Page Setup

A dialog box will appear with the Page tab displayed. The options on this tab are similar to other Microsoft Office applications. The Margin tab contains the margin settings for the current report and an option to print borders around the data. Adjust these values as needed. The Header and Footer tabs allow for configuration of titles and footer information for reports. The view below shows the Header tab used for adding the project title values.

To add Header or Footer information to the title of a project:

- Click the **Header** or **Footer** tab.
- Click on the **Left**, **Center**, or **Right** tab in the lower section of the box.



- Click the down arrow to view the General drop-down menu.
- Select field value.
- Click **Add**.
- Repeat for additional data.



The Header and Footer settings are unique per report and should be checked using Print Preview before each reported is printed.



A current date is not preset to show in either the header or the footer title lines. Add the system's date using the center button above the General drop-down menu.

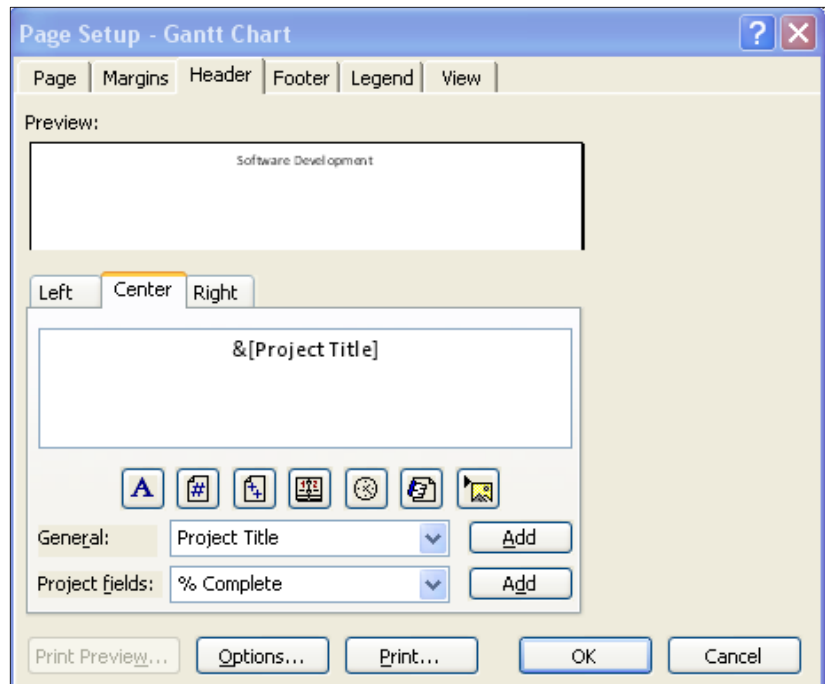


Figure 12-6 **PLACEHOLDER**

The Legend tab is used to customize or turn off the legend printed on Gantt charts. If unique Gantt chart formatting has been created, the alternate color coding will automatically appear in the legend when the Gantt

chart is printed. The Legend Labels button allows for font color and font selection changes. To disable the legend printed on Gantt charts, select None on the right side of the dialog box .

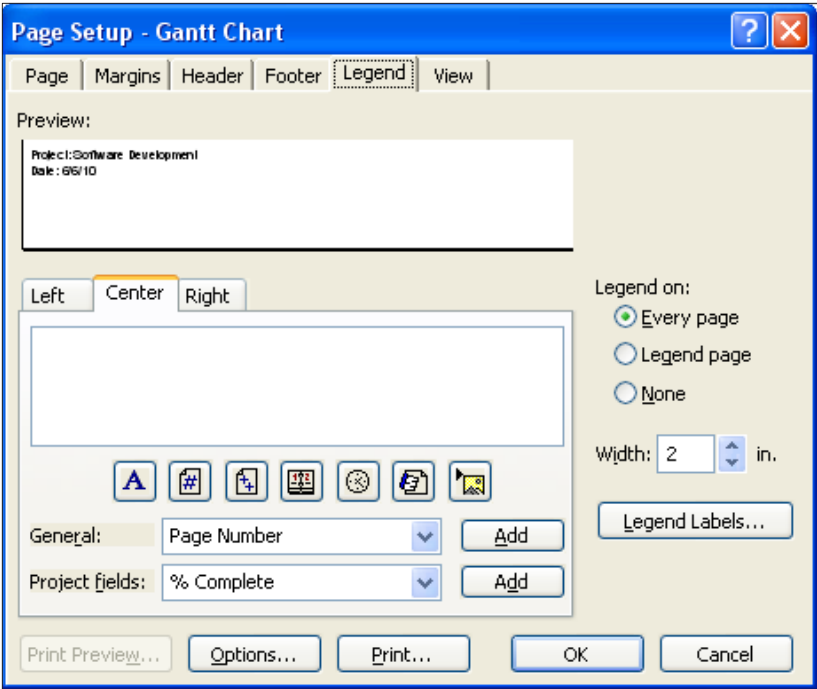


Figure 12-7    PLACEHOLDER

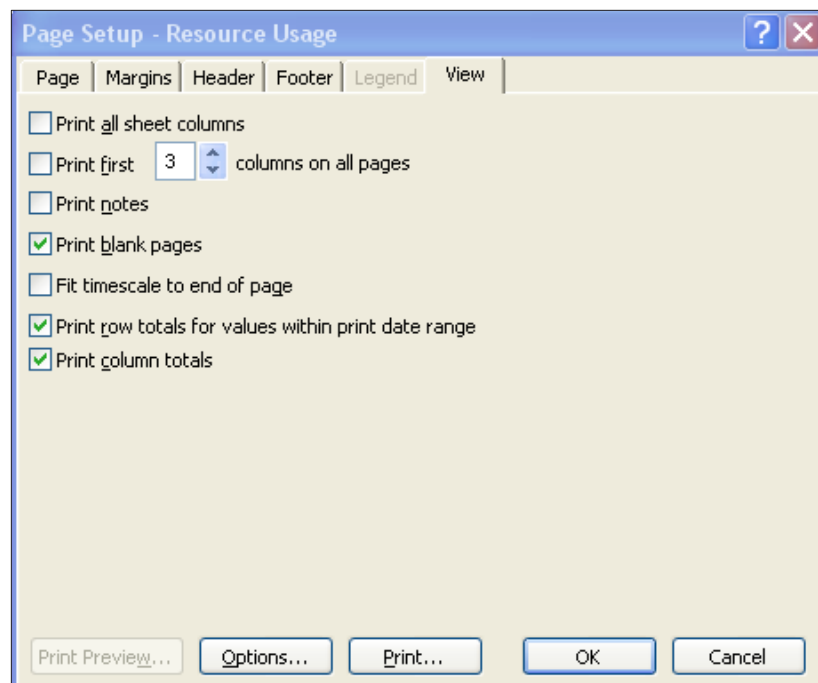
The View tab contains options for specific views, but not all options will be available for each report. The options on the View tab are:

Table 12.4    PLACEHOLDER

Option	Result of selecting option
Print all sheet columns	All columns in the table of the active view will be printed.

Table 12.4 PLACEHOLDER

Option	Result of selecting option
<b>Print first (enter number) columns on all pages</b>	Specify the number of columns to be printed on all pages of the report. When printing a Gantt chart, it is advantageous to add the task name to all pages.
<b>Print notes</b>	A separate notes page will be added to the report. Task ID numbers will be used to tie the note to the task.
<b>Print blank pages</b>	When printing Gantt charts, blank pages might result. Should these pages be printed?
<b>Fit timescale to end of page</b>	Adjusts the timescale for the report.
<b>Print row totals for values within print date range</b>	Adds totals to Resource Usage and Task Usage reports.
<b>Print column totals</b>	Adds totals to Resource Usage and Task Usage reports.

Figure 12-8 **PLACEHOLDER**

## Copy Picture

Use the Copy Picture tool to take a picture of your active view and store it on the clipboard. After it is stored, it can be pasted into Powerpoint, Word, Excel or any other application. The Copy Picture button, by default, is not available on any of the ribbon bars, but it can easily be added to the Quick Access Toolbar.

To add the Copy Picture tool to the Quick Access Toolbar:

- Click the down arrow to the right of the Quick Access Toolbar.
- Select **More Commands**.
- Under Choose commands from Popular commands in the left box select, **Copy Picture**.

- Click **Add**.
- Click **OK** to close.

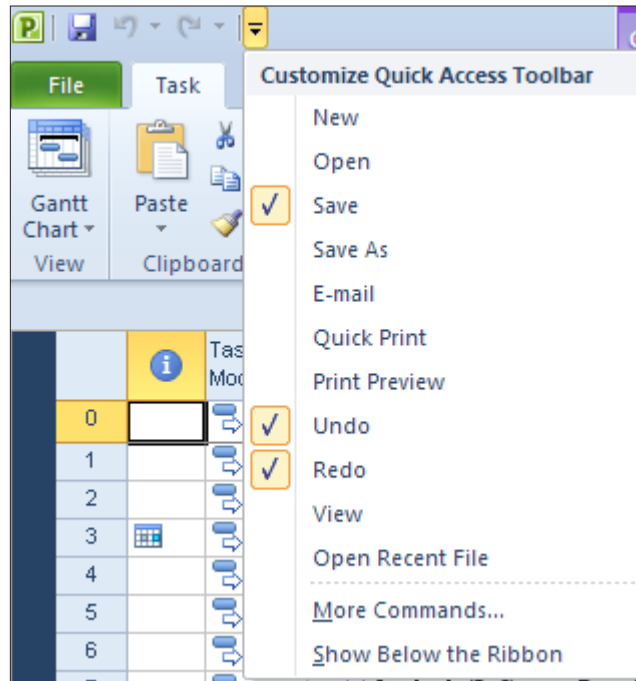


Figure 12-9 **PLACEHOLDER**

The copy picture icon looks like this:



Figure 12-10 **PLACEHOLDER**

To use the Copy Picture tool, the view must be displayed and refined for the picture. Navigate to the view to be copied. Some adjustments to a view might include:

- Expand or collapse the work breakdown structure.
- Adjust timescale.
- Adjust titles in the timescale.
- Change formatting.
- Highlight tasks.
- Add drawing elements.

If printing a Gantt chart, adjust the vertical bar in the middle to show the columns to be included and click **Copy Picture** to open the Copy Picture dialog box shown below.

- **Render image** - select image to render For Screen, For Printer or To GIF image file.
- **Copy** - rows on screen or Selected rows.
- **Timescale** - as shown on the screen or date range.
- Click **OK** to copy to the clipboard.

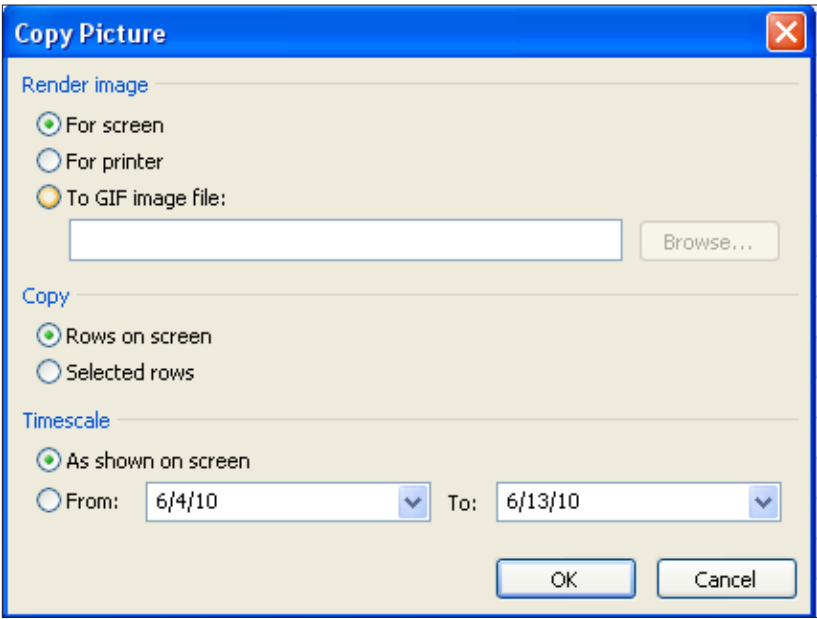


Figure 12-11   **PLACEHOLDER**

Use the image to paste into a Powerpoint presentation, a Word document, an email or other application. After pasting, resize the image as necessary.

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## Save as PDF

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In Project 2013, we now have the option to save files as PDF's. This can be accomplished in a few different ways. Both ways are accessed via the "backstage" (File Menu).

To save as PDF:

1. In the **File** tab, click **Save & Send**.
2. Select **Create PDF/XPS Document** under the **Save & Send** menu to the right.
3. Select **Create PDF/XPS** under the **Create a PDF/XPS Document** menu to the far right.
4. A browser window will appear asking you to name the file and designate where to store the file. The filetype defaults to "PDF."
5. Once you've named the file and provided the destination location for the file, click **OK**.
6. Project will now ask you to determine what the **Publish Range** is (all dates or a set range of dates) as well as a few items pertaining to the information provided in the PDF file. Select the options desired and click **OK**.

The file will be created and saved. Adobe will not launch the file once it's been created. You can open the PDF from its saved location.

Alternate method to save as PDF:

1. In the **File** tab, click **Save As**.
2. Provide a filename and select **Save as Type** to be **PDF Files (\*.pdf)**
3. Project will now ask you to determine what the **Publish Range** is (all dates or a set range of dates) as well as a few items pertaining to the information provided in the PDF file. Select the options desired and click **OK**.

The file will be created and saved. Adobe will not launch the file once it's been created.



The **Save As PDF** function is limited to a single-pane view (i.e. without a split). If you have Gantt Chart with Timeline view displayed, the PDF will generate based on the currently selected (active) pane. This will be either Gantt Chart or Timeline, not both.

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## **Send as an Attachment**

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## Gantt Charts: Timescale, Turn Off Legend, Show the Format Ribbon

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### Using the Format Tab

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The Format tab buttons help you customize the text, columns, colors, and other elements of each type of view. The groups and buttons in the Format tab are different for each type of view. The Format tab is a contextual tab and the content of the tab changes automatically when you change the view.

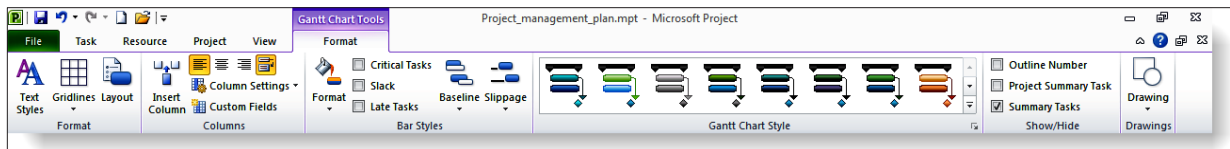


Figure 12-12 Project Ribbon – Gantt Chart Format Tab

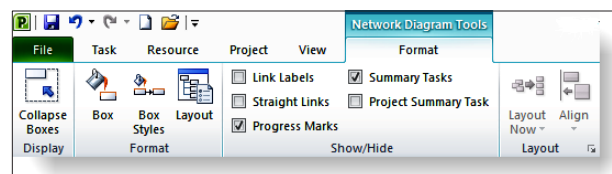
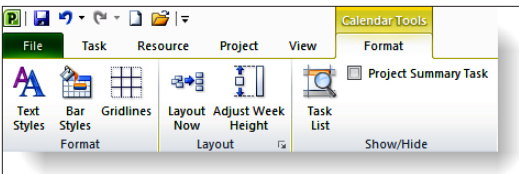


Figure 12-13 Project Ribbon – Network Diagram Format Tab



**Figure 12-14**   Project Ribbon – Calendar Tools Format Tab

You can customize the chart part of these views in Project to better suit your needs. For example, you can change how non-working time is displayed, or you may want to format a Gantt Chart view to quickly identify specific tasks, or perhaps you want to add text to specific bars to help you identify them.



Any changes you make to one Gantt Chart view does not change the look of another Gantt Chart view. For example, if you apply formatting to the Gantt Chart view, this will not carry over to the Detail Gantt view.

## Formatting Text Styles

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You can use text styles to change the format of text for one cell in a table or apply a unique format to an entire category of information, such as all critical tasks. You may also want to change text to be more readable or to look distinct to garner attention for certain tasks.



You can format the text the same way for any view.



You can't format fonts in the Calendar view, but you can format categories of text, so text will have distinct formatting for items such as all critical tasks or all summary tasks.

## Formatting Selected Text

To format selected text:

4. Select the cell containing text that you want to format.
5. In the Ribbon, **Format** tab, **Format** group, click on **Text Styles**.

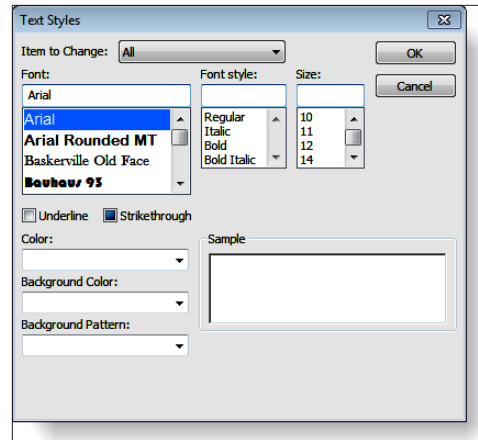


Figure 12-15 Text Styles Dialog

6. From the three lists across the top of the dialog box you can select Font type, Font style and/or the Font Size. You can also select an Underline or Strikethrough check box and set the Font color, Background color and/or choose a Background pattern. A preview of your selection will appear in the sample area.
7. Click **OK** to save changes.

## Formatting Categories of Text

To format categories of text:

1. Select the cell containing text that you want to format.
2. In the Ribbon, **Format** tab, **Format** group click on **Text Styles**.
3. Click the dropdown arrow next to **Item to Change**: select a category of text.

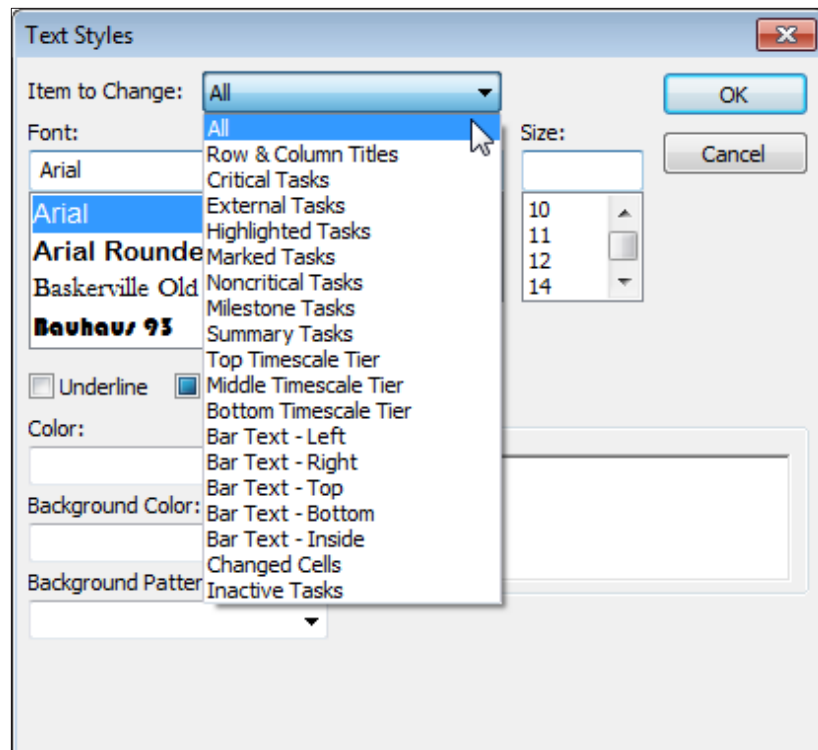


Figure 12-16 Text Styles Dialog with Items to Change Menu

4. Select the settings that you want for the text, including font, font style, font size, color and script.
5. Click **OK** to apply the formatting.

## Formatting the Gantt Chart

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In addition to text styles you can format the task bars. You can make changes to the shape, color, and pattern, as well as style of the bar.

## Changing the Gantt Bars Quickly Using a Style

With a single click, you can apply a pre-defined style to all bars in a Gantt Chart view.

To apply pre-defined styles to Gantt bars:

1. Apply a Gantt Chart view.
2. In the **Format** tab, **Gantt Chart Style** group, click a style in the **Gantt Chart Style** group.

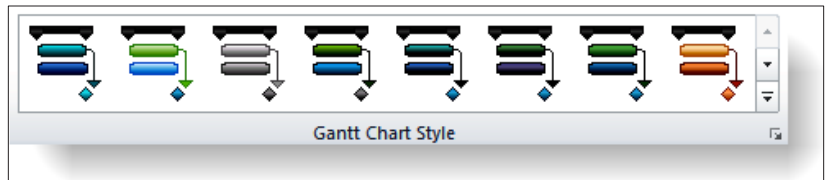


Figure 12-17 Gantt Chart Styles Group

3. The style is instantly applied to all the bars in the view.

## Changing the Color, Shape, or Pattern of Gantt Bars

To call attention to task bars on a Gantt Chart view, such as a milestone or summary task, you can change their color, shape, or pattern to separate them from other bars of a particular type.

To format the task bar:

1. Apply a Gantt Chart view.
2. In the **Format** tab **Bar Styles** group, click the **Format** dropdown arrow, and click **Bar Styles**.



You can also double click within the chart portion of a Gantt Chart view, but not on individual bars, to open the Bar Styles dialog box.

- 3. In the **Name** field, click the type of bar (such as Task or Progress) that you want to format.
- 4. Click the **Bars** tab.

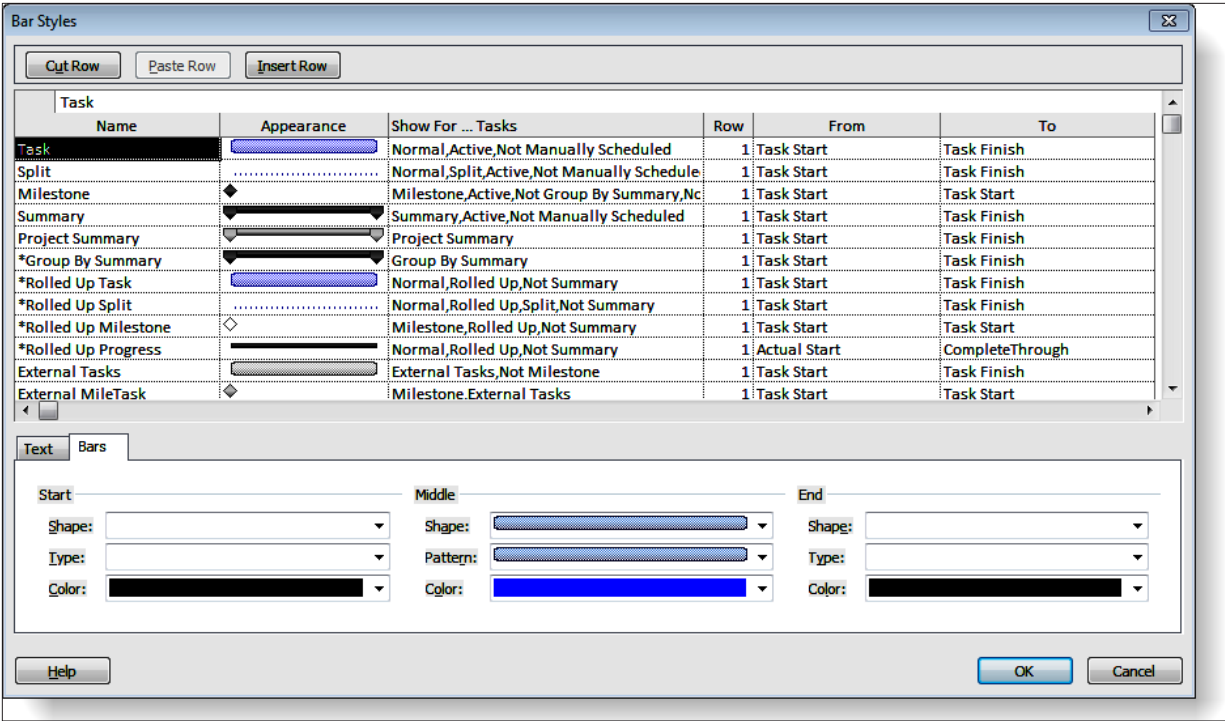


Figure 12-18    Bar Styles Dialog

- 5. Under Start, Middle, and End, click the shapes, types or patterns, and colors for the bar.

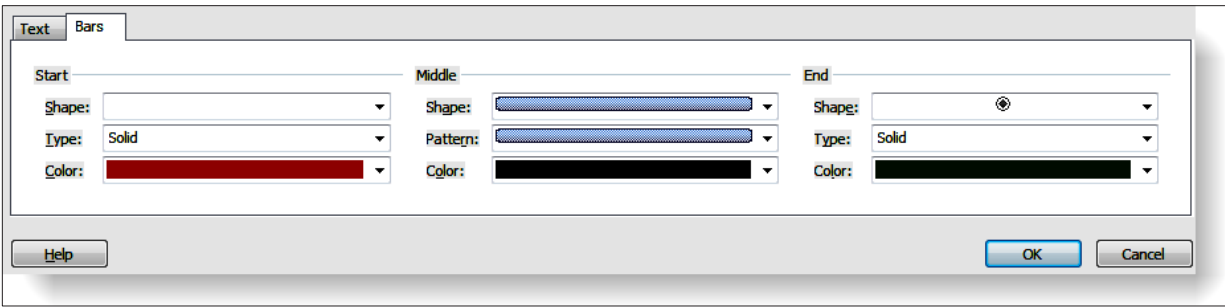


Figure 12-19    Bottom Pane of Bar Styles Dialog – Bars Tab Selected



To highlight a single Gantt bar by changing its formatting, right click on the individual bar and select a fill color.

## Creating a New Type of Gantt Bar

If you want to spotlight a particular task category that is not represented by its own Gantt bar, you can create a new Gantt bar style. For example, you can create a type of Gantt bar to show available slack or to call attention to delayed tasks.

To create a new task bar style:

1. Apply a Gantt Chart view.
2. In the **Format** tab, **Bar Styles** group, click the **Format** dropdown arrow, and click **Bar Styles**.

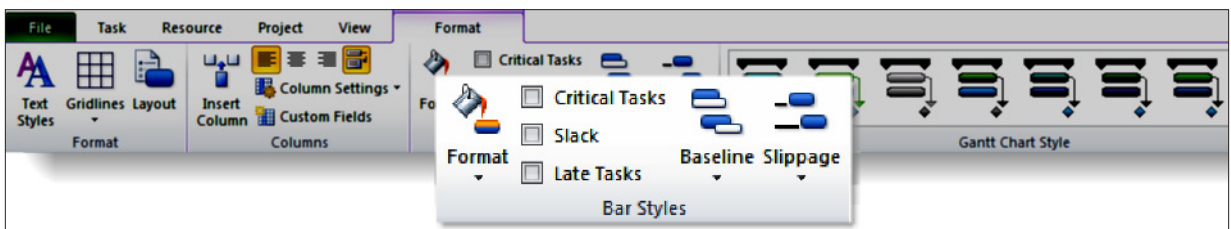


Figure 12-20 Project Ribbon – Format Tab, Bar Styles Group

3. In the **Gantt bar** list, select the row below where you want to insert a new Gantt bar style, and click **Insert Row**.
4. In the **Name** column of the new row, type a name for the new bar style.
5. In the **Show For Tasks** column of the new row, type or select the task type you want the bar to represent.



To display a Gantt bar for tasks of multiple types (such as tasks that are milestones and critical), type a comma (,) after the task category in the text entry box, and type or select a second task category in the **Show For Tasks** field.

6. In the **From** and **To** columns, type or select the fields you want to use to position the start and finish points of the new Gantt bar.



To create a symbol that represents a single date, type or select the same field in the **From** and **To** columns.

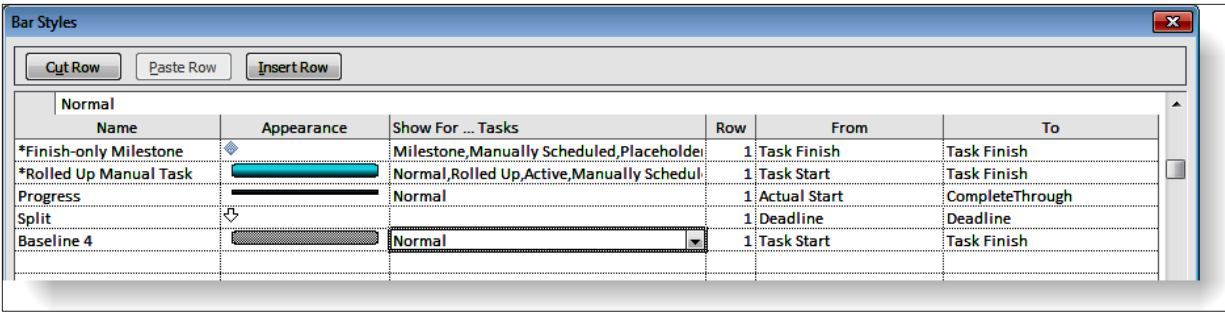


Figure 12-21    Bar Styles Dialog for Create New Gantt Bar

7. Click the **Bars** tab, and under **Start, Middle, and End**, select shapes, patterns or types, and colors for the bar.



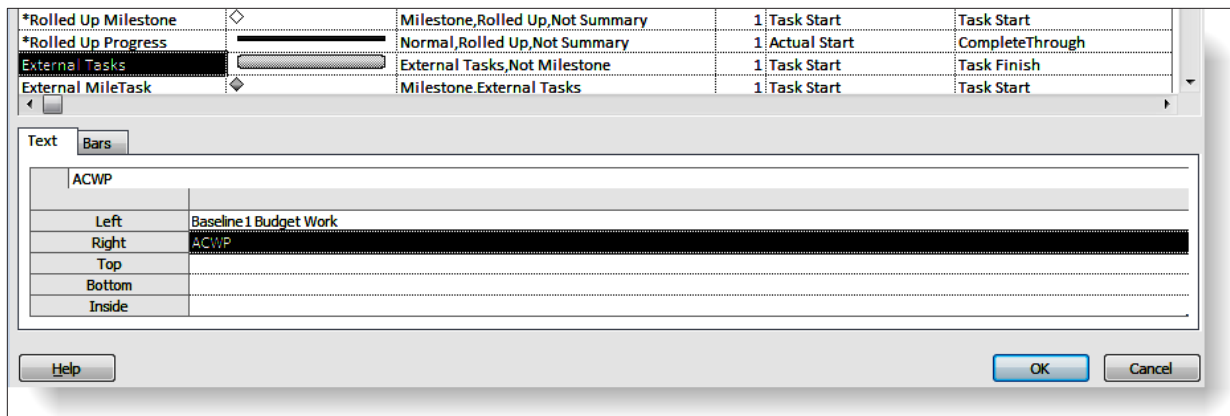
To quickly highlight the critical path on the Gantt Chart, in the **Format** tab, **Bar Styles** group, click the check box for **Critical Tasks**. The critical task bars will become red. You can also apply a visual cue showing **Slack** or **Late Tasks** by clicking the appropriate checkbox.

# Adding Text to Gantt Bars

Specific project information, such as task names, resource names, completion percentages, and start dates, can be added to bars on a Gantt Chart view.

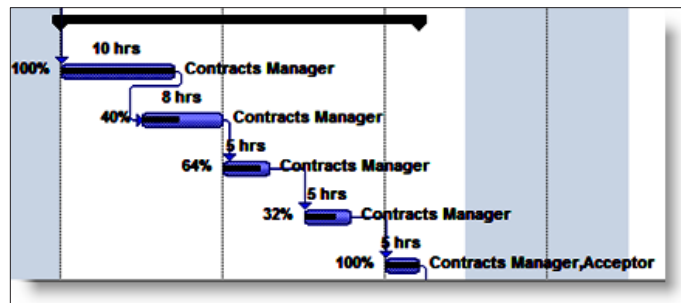
- To add text to task bars:
1. Apply a Gantt Chart view.
  2. In the **Format** tab, **Bar Styles** group, click the **Format** dropdown arrow, and click **Bar Styles**.
  3. In the table, click the type of Gantt bar (such as Task or Progress) that you want to add text.
  4. Click the **Text** tab.
  5. In the **Left, Right, Top, Bottom, and Inside** boxes, type or select the field that contains the data you want to display on the Gantt bar.





**Figure 12-22** Dialog for Adding Text to Gantt Bars

6. To add text that is unique to each task, type or select a custom text field, such as Text1, Text2, or Text3 from the available dropdown list. Text that you enter into these fields from other views is automatically added to the Gantt bars.



**Figure 12-23** Link Lines with Descriptions

## Changing the Appearance of Link Lines Between Gantt Bars

When you link tasks, Project displays link lines on a Gantt Chart view that show the dependency of the linked tasks.

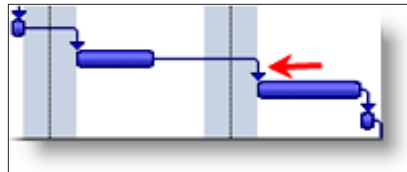


Figure 12-24 Link Line

You can change the way link lines appear or hide the link lines.

To change the appearance of links between Gantt bars:

1. Apply a Gantt Chart view.
2. In the **Format** tab, **Format** group, click **Layout**.

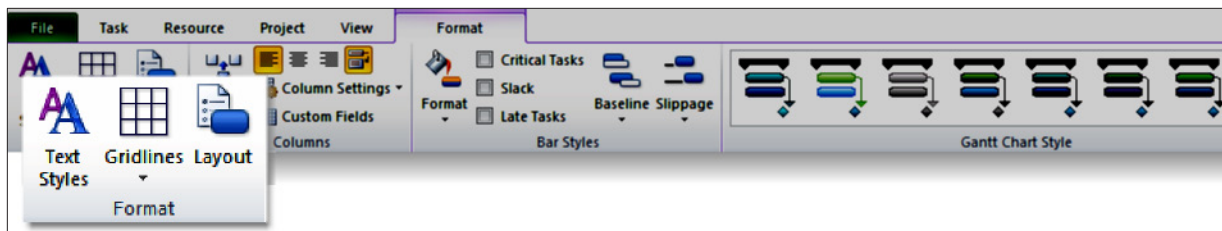


Figure 12-25 Project Ribbon – Format Tab

3. Under **Links**, click the type of link line that you want to use. If you choose the first type of link, then the link lines will not appear.

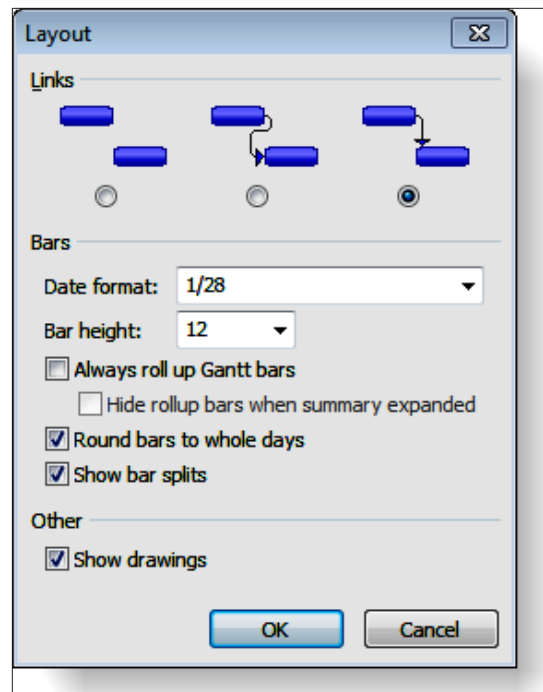


Figure 12-26 Layout Dialog Box

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## Reporting

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### Visual Reports

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Visual reports are graphical type reports that are available in Project 2013. These reports are defined using a template in Project 2013 and use either a Visio PivotDiagram or Excel PivotTable technology to generate the final report. Once a report is generated, changes and fine-tuning of the report can be performed through Visio or Excel.

Since Visual Reports use Pivot table technology, knowledge of Pivot tables is helpful for the project manager to gain the greatest benefit from these reports.

In this lesson we will discuss:

- Overview of Visual Reports
- The Anatomy of Pivot Tables
- Viewing a Visual Report
- Creating a Visual Report template

### Overview of Visual Reports

Visual Reports are reports based on dimensions and measures that produce graphs using Pivot Tables. Pivot Tables will be discussed in the next lesson. When a Visual Report is run, an On-line Analytical Processing (OLAP) cube of data is built based on the metrics stated in the specifications for the Visual Report. After the cube is built, Project 2013 connects to either Visio or Excel to display the report. If an Excel-based report is selected, the report will be based on Pivot Tables. If a Visio-based report is selected, a Visio Pivot Diagram will be produced.

Once a report is generated, it can be manipulated as a Pivot Table and tailored to fit your needs. Types of manipulations include expanding and

contracting outline levels, changing field values, selecting options, adding totals and changing the appearance of graphs. After the Visual Reports are generated, they can be saved or published to a reporting website.

Project 2013 provides multiple Visual Report definition templates found in the Visual Reports - Create Report dialog box. Options are available to filter the Excel templates from the Visio templates. All templates are contained in the All tab within the dialog box.

Sub tabs are provided for various report categories, and contain the following report options:

**Table 12.5 Task Summary Tab**

<b>Report</b>	<b>Content</b>	<b>Excel or Visio</b>
<b>Critical Tasks status report (Metric)</b>	Work and Work remaining for critical and non-critical tasks.	Visio
<b>Critical Tasks status report (US)</b>	Work and Work remaining for critical and non-critical tasks.	Visio

**Table 12.6 Resource Summary Tab**

<b>Report</b>	<b>Content</b>	<b>Excel or Visio</b>
<b>Resource remaining work report</b>	Work, Remaining Work, total Work for work resources.	Excel

**Table 12.7 Assignment Summary Tab**

<b>Report</b>	<b>Content</b>	<b>Excel or Visio</b>
<b>Resource status report (Metric)</b>	Work and Cost values per resource.	Visio

**Table 12.7** Assignment Summary Tab

Report	Content	Excel or Visio
Resource status report (US)	Work and Cost values per resource.	Visio
Task status report (Metric)	Work and percent of work completed by WBS level.	Visio
Task status report (US)	Work and percent of work completed by WBS level.	Visio

**Table 12.8** Task Usage Tab

Report	Content	Excel or Visio
Cash flow report	Timephased task cost data.	Excel

**Table 12.9** Resource Usage Tab

Report	Content	Excel or Visio
Cash flow report (Metric)	Baseline Cost vs Actual Cost over time by resource type.	Visio
Cash flow report (US)	Baseline Cost vs Actual Cost over time by resource type.	Visio
Resource Availability report (Metric)	Total capacity, Work and remaining availability per. resource	Visio

Table 12.9 Resource Usage Tab

Report	Content	Excel or Visio
<b>Resource Availability report (US)</b>	Total capacity, Work and remaining availability per resource.	Visio
<b>Resource cost summary report</b>	Resource costs per resource type.	Excel
<b>Resource work availability report</b>	Work and remaining availability over time.	Excel
<b>Resource work summary report</b>	Work, Actual Work and Remaining Availability per resource.	Excel

Table 12.10 Assignment Usage Tab

Report	Content	Excel or Visio
<b>Baseline Cost Report</b>	Compares Baseline Cost, Actual Cost and Cost.	Excel
<b>Baseline Report (Metric)</b>	Baseline, Actual Work and Cost over time.	Visio
<b>Baseline Report (US)</b>	Baseline, Actual Work and Cost over time.	Visio
<b>Baseline Work Report</b>	Baseline Work, Baseline Cost, and Actual Work.	Excel

**Table 12.10** Assignment Usage Tab

Report	Content	Excel or Visio
Budget Cost Report	Budget Cost, Baseline Cost, Cost and Actual Cost.	Excel
Budget Work Report	Budget Work, Baseline Work, Work, Actual Work.	Excel
Earned Value Over Time Report	Timephased – Actual Cost of Work performed, baseline values and Earned Value.	Excel

# Anatomy of a Pivot Table

To understand Visual Reports, some understanding of Pivot Tables is helpful. Pivot Tables are flexible tables based on measures and dimensions. The information below is an overview of a Pivot Table based report. Additional information regarding Pivot Tables can be found in any Excel reference book, through software Help, or online.

In the table below, sales data from The Chocolate Company shows that sales of different products have occurred in multiple locations. The Chocolate Company also keeps track of the customer type and products sold. We might want to know total sales by customer type, product or location. Pivot Tables have the flexibility to process any of these report requests quickly.

The data below is the source data that will be used to generate the Pivot Table:



Table 12.11 Chocolate Company Sales

Customer	Customer type	Location	Product	Quantity in bars	Price
Customer A	Retail	Chicago	Dark	48	120
Customer B	School	Rome	Milk	24	60
Customer C	Vending	Sydney	White	12	30
Customer D	Retail	Chicago	Dark almonds	36	45
Customer E	School	Rome	Milk almonds	48	120
Customer F	Vending	Sydney	White peanuts	24	60
Customer G	Retail	Chicago	Dark	12	30
Customer H	School	Rome	Milk	36	45
Customer I	Vending	Sydney	White	48	120
Customer J	Retail	Chicago	Dark almonds	24	60
Customer K	School	Rome	Milk almonds	12	30
Customer L	Vending	Sydney	White peanuts	36	45
Customer M	Retail	Chicago	Dark	48	120

In the view below, a Pivot Table has been created using the above data. The data below is consolidated to show sales by Customer type:

Table 12.12 PLACEHOLDER

Customer Type	Sum of Price
Retail	480
School	180
Vending	90
Wholesale	135
Grand Total	885

In the next example, the table was changed to show sales by Location:

Table 12.13 PLACEHOLDER

Location	Sum of Price
Chicago	375
Rome	255
Sydney	255
Grand Total	885

In the next example, sales by Product:

Table 12.14 PLACEHOLDER

Product	Sum of Price
Dark	270

Table 12.14 PLACEHOLDER

Product	Sum of Price
Dark almonds	105
Milk	105
Milk almonds	150
White	150
White peanuts	105
Grand Total	885

Pivot Tables are easily changed to create the type of report necessary for your reporting needs, based on the values contained in the Pivot Table data. Visual Reports will be used to create the Pivot Diagram or Pivot Table but the project manager will need to customize the generated report.

## Viewing Visual Reports

Project 2013 comes with built in Visual Report templates to report on cost, work and resource data. Having a specific goal in mind for the type of report you want will help generate more meaningful report data.

To open the Visual Reports – Create Report dialog box:

- Project → Visual Reports

To create a report:

- Select any report.
- Change timeframe for assignment (usage) data.
- Click **View**.

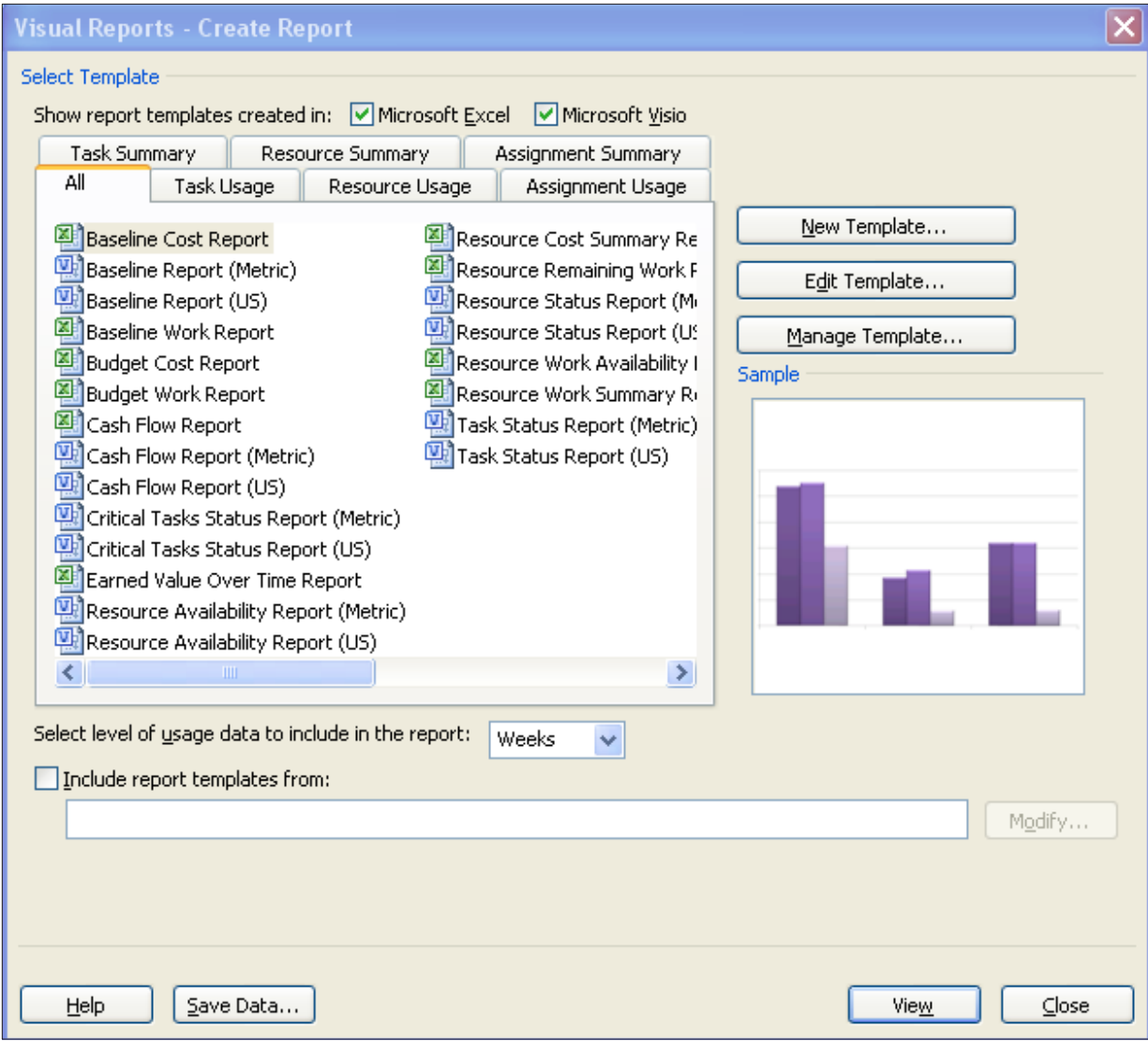


Figure 12-27    PLACEHOLDER

The report will generate by creating an OLAP cube and will open either Visio or Excel. In the generated Pivot Table select the data to be viewed on the report. Notice that the data viewed on the table can also be viewed in chart format.

Options are available for saving the generated OLAP cube or creating an Access database from the data by clicking the Save Data... button.

## Dashboard Reports

### What are Dashboard Reports?

Dashboard reports are reports that display project data in tabular and graphic form. Each report displays different data and can be customized to tailor the reports for each user's needs.

Below is a view of the Overallocated Resources Dashboard Report. Note that there are two charts each representing different resource data. The chart on the left represents Actual Work v Remaining Work. The chart on the right is displaying resources that are Overallocated at the day level. Each of these reports may be altered to adjust the chart type, chart elements and details of the display data.

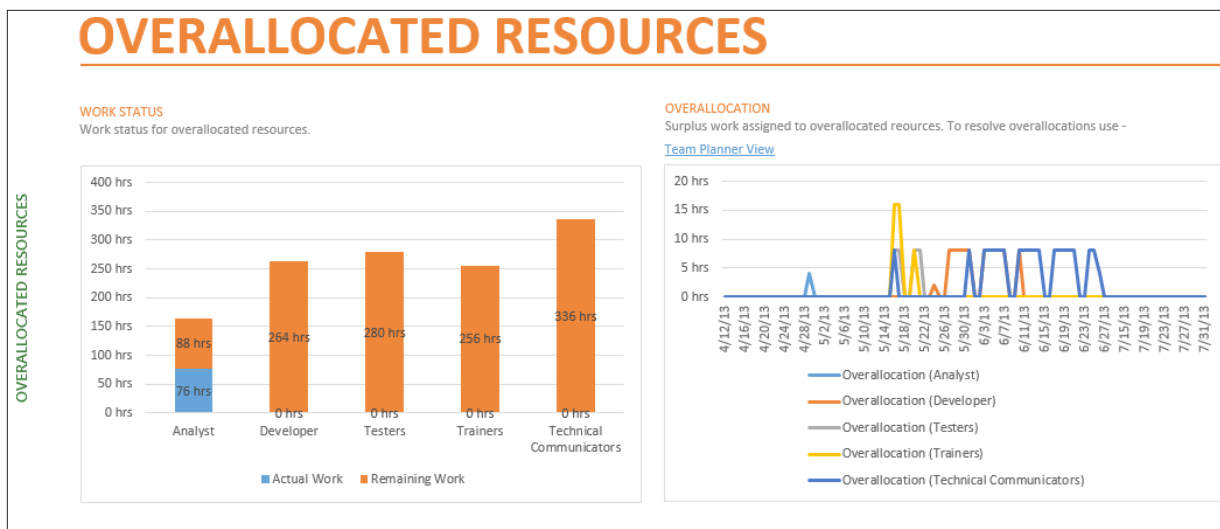


Figure 12-28 PLACEHOLDER

## Data included in the Dashboard Reports

Dashboard Reports contain data relating to project progress, variance calculations, and critical path. Below are listed some of the data which are included in the reports. If you are not using the data needed to populate the reports, the reports will not display properly.

Some of the data needed for the reports includes the following project data values:

- Task Duration, Cost and Work.
- Resource Cost and Work.
- Baseline comparison.
- Status date.
- Status field: Late, On Time, Future

To Display a Dashboard Report:

1. Click on the **Reports** tab
2. Click on a Report Category: **Dashboards, Resources, Costs, In Progress**
3. Click on a Report to display

To change parameter values displayed on a Dashboard Report:

1. Click on the **Reports** tab
2. Click on a Report Category: **Dashboards, Resources, Costs, In Progress**
3. Click on a Report to display
4. Click inside of a graph. Options will appear on the right side of the view.
5. Change options as necessary. Close by options by clicking on the X in the upper left corner of the options box.
6. Other changes may be made by clicking on formatting changes on the Design ribbon which will appear when a Report is selected.



Changes to Dashboard Reports will be remembered within the file and will appear the next time the report is viewed.



Clicking on the **Page Breaks** button will display the page breaks as for printing the report. The separate report graphics and tables may be dragged to different pages for printing purposes.

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## Timeline View Report

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### Customizing Timeline Views

The Timeline view is new view to Project 2013. The purpose of the Timeline view is to display project tasks using a timeline format and export the view to other applications such as Word, Excel, Outlook and Powerpoint.

Gantt Chart with Timeline is the default view in Project 2013. This view is a split screen with the Timeline view on the top and the Gantt Chart View on the bottom.

To turn Timeline view off/on:

- **Task → Gantt Chart**
- **View → Timeline**

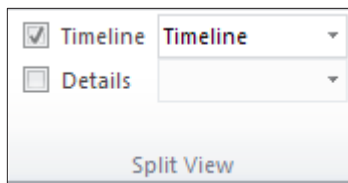


Figure 12-29

PLACEHOLDER

Below is a view of the default Timeline view. The Timeline view is showing the information for the project summary task. The length of the timeline represents the duration of the project. There is a timeframe window open in the middle to highlight a specific timeframe:

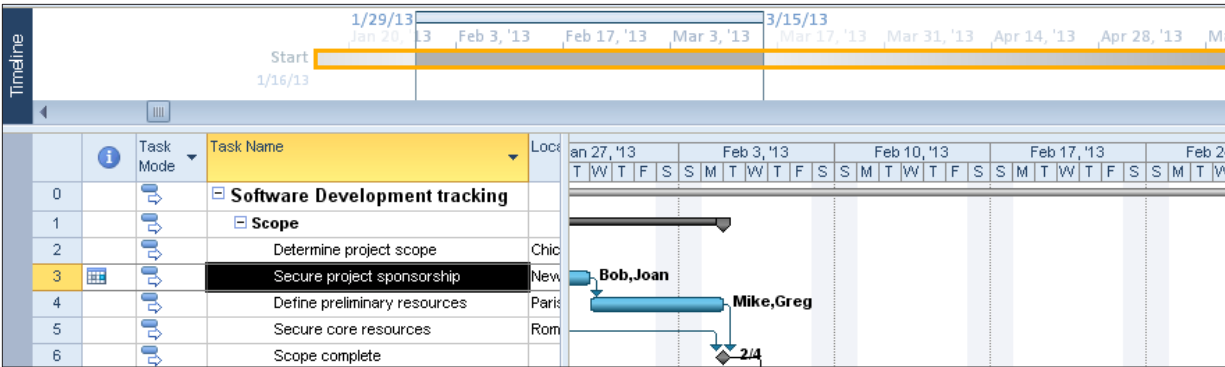
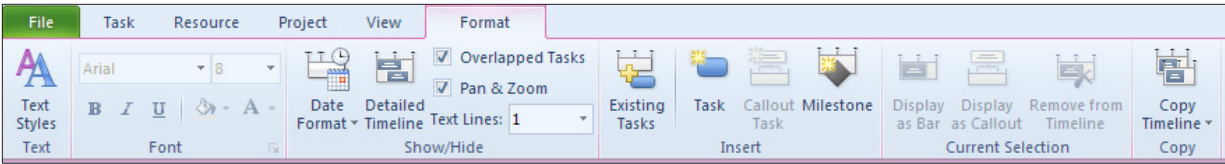


Figure 12-30    **PLACEHOLDER**

To format or add more data to the Timeline view:

- Click inside the Timeline view window
- Click on the Format tab

Below is a view of the Timeline format bar. Use the buttons on this bar to add additional tasks and format the Timeline view.



Within the Timeline view there is a timeframe window highlighted in the diagram below.

- The Timeframe window may be dragged left and right to emphasize different timeframes of the project schedule. The Gantt bars will adjust as the timeframe window is moved.
- Change the timeframe window by clicking in the timeline view and clicking the zoom slider in the lower right corner of the screen.
- The time density of the Timeline view does not have to match the time density of the Gantt Chart View.
- To turn on and off the Timeframe window, click the Pan & Zoom button on the Format bar.
- Use the Date format button on the Format bar to format the dates in the Timeline view.
- Use the Detailed Timeline button to show task names and dates in the view.

The view below shows the standard Timeline view with the Gantt chart



view below. The Timeframe window is highlighted:

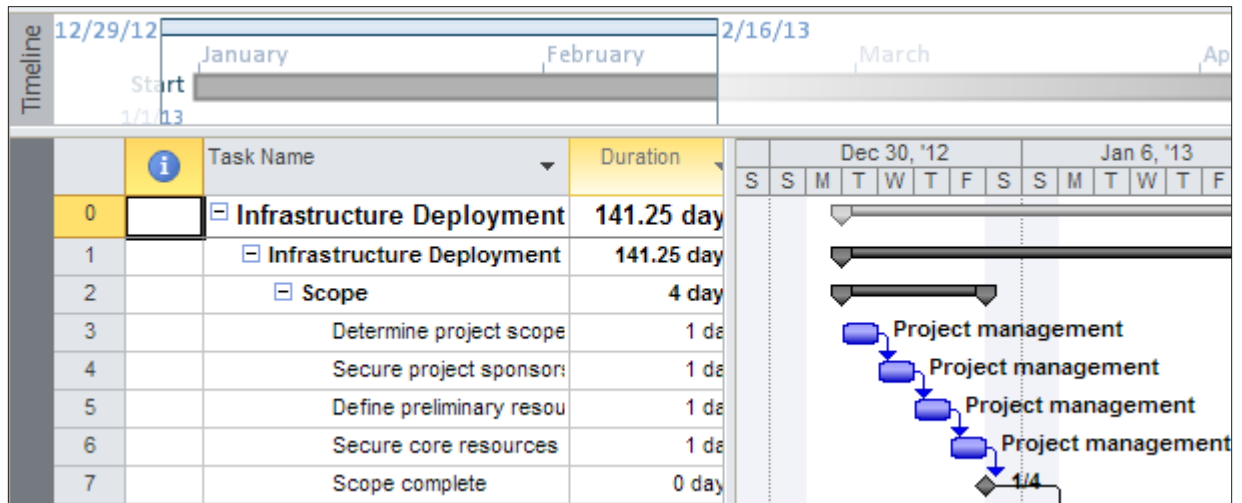
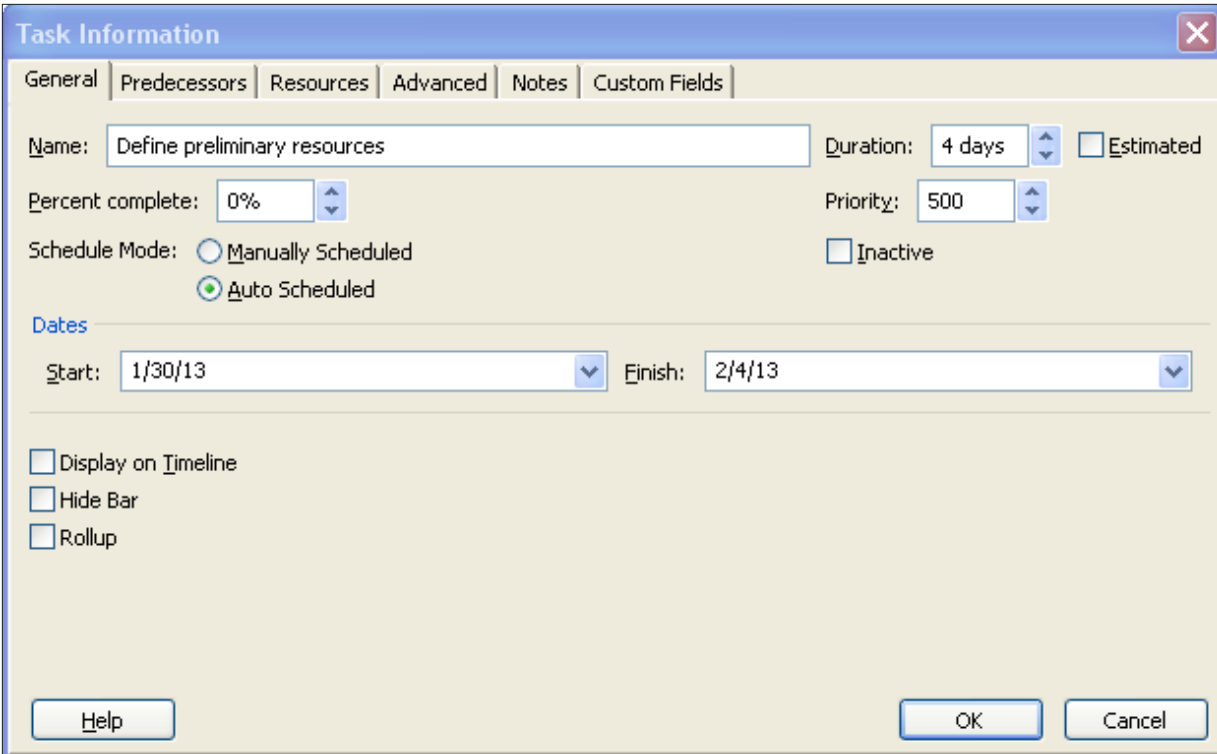


Figure 12-31 PLACEHOLDER

Adding additional tasks to the Timeline view will help build a better picture of your project. Tasks can be individually included to the Timeline view via the Task Information dialog box under the General tab. Double click a task to display the Task Information dialog box.

The image shows a 'Task Information' dialog box with a blue title bar and a close button (X) in the top right corner. It has several tabs: 'General', 'Predecessors', 'Resources', 'Advanced', 'Notes', and 'Custom Fields'. The 'General' tab is selected. Inside the dialog, there are several input fields and checkboxes. The 'Name' field contains 'Define preliminary resources'. The 'Duration' field is set to '4 days' with a small up/down arrow, and there is an unchecked 'Estimated' checkbox next to it. The 'Percent complete' field is set to '0%' with an up/down arrow. The 'Priority' field is set to '500' with an up/down arrow, and there is an unchecked 'Inactive' checkbox next to it. The 'Schedule Mode' section has two radio buttons: 'Manually Scheduled' (unchecked) and 'Auto Scheduled' (checked). Below this is a 'Dates' section with 'Start' and 'Finish' date pickers. The 'Start' date is '1/30/13' and the 'Finish' date is '2/4/13'. At the bottom left, there are three unchecked checkboxes: 'Display on Timeline', 'Hide Bar', and 'Rollup'. At the bottom right, there are three buttons: 'Help', 'OK', and 'Cancel'.Figure 12-32 **PLACEHOLDER**

The timeline format bar has several command buttons that will help flag tasks for inclusion into the Timeline view. Clicking the Existing Tasks button will display a list of all tasks for a project where you can scroll through and select the tasks you want displayed in the Timeline view.

To add tasks to the timeline view using the Existing Tasks button:

- Click **Existing Tasks**
- Using the check boxes, select the tasks to add
- Click **OK** to close.

See below for an example of the Existing Tasks choice list. It is easy to tell the difference between summary and detail tasks:

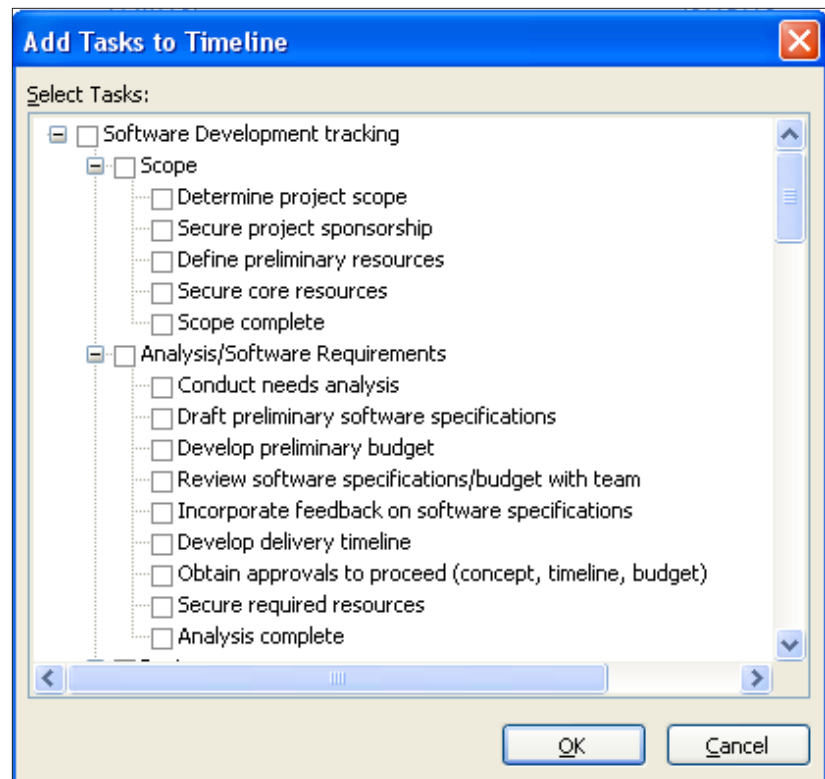


Figure 12-33 PLACEHOLDER

The timeline view should be planned carefully to create a meaningful report. Too much information can confuse the reader. Consider creating a high level tasks report that shows sections of work planned to be completed within timeframes. Below is a view where outline Level 1 tasks have been added to the Timeline view.

To add Outline Level 1 tasks (Summaries) to the Timeline view:

- **Tasks → Gantt Chart**
- **View → Outline → Outline level 1**
- For each summary task to be added to the Timeline view, Select and Right click. Multiple selections maybe made.
- Click **Add to timeline**

The Timeline view below, displays Outline Level 1 Summary tasks only and the Gantt chart displays the same Outline Level 1 Summary tasks.

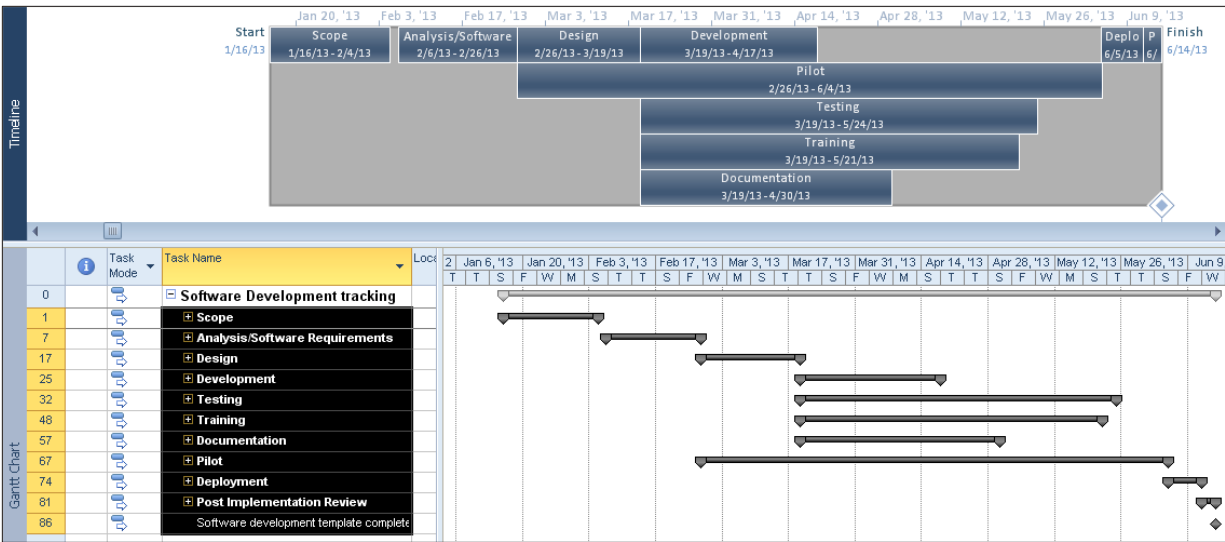


Figure 12-34 PLACEHOLDER

Milestone can also be added to the Timeline view.

To add a milestone to the Timeline view:

- **Tasks → Gantt Chart**
- **View → Filter → Milestone**
- Select the milestone tasks and Right click
- Click **Add to timeline**

The diagram below displays Outline Level 1 tasks with milestones added:

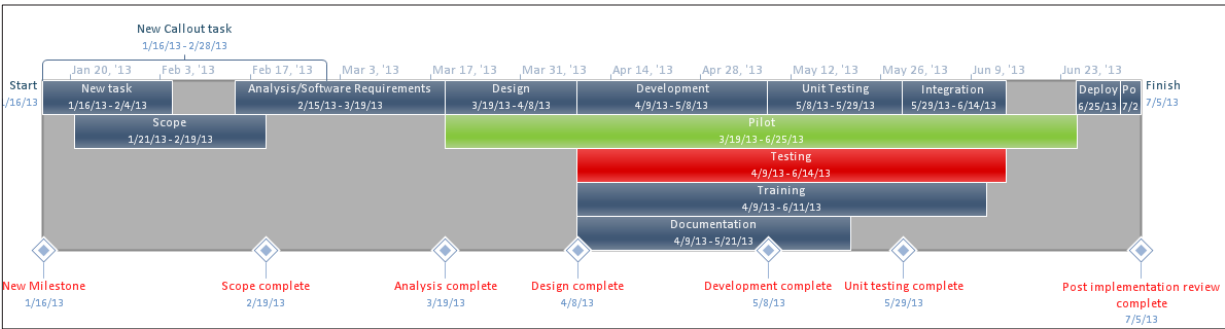


Figure 12-35 PLACEHOLDER

Tasks may be added to the project using the Timeline view format bar. When adding tasks using these buttons, the tasks will be added to the end

of the project schedule and will start on the first day of the project or the current date depending on the scheduling option. The choices are:

- Adding a new task to the timeline
- Adding a new callout task to the timeline
- Adding a new milestone to the timeline

Below is a view showing a new task, a new callout task and a new milestone added to the timeline and the project schedule. The lower half of the view shows the tasks added to the Gantt Chart view. Callout tasks are originally placed above the timeline spanning the timeframe of the task. After they are created, they may be dragged to alternate locations within the Timeline View.

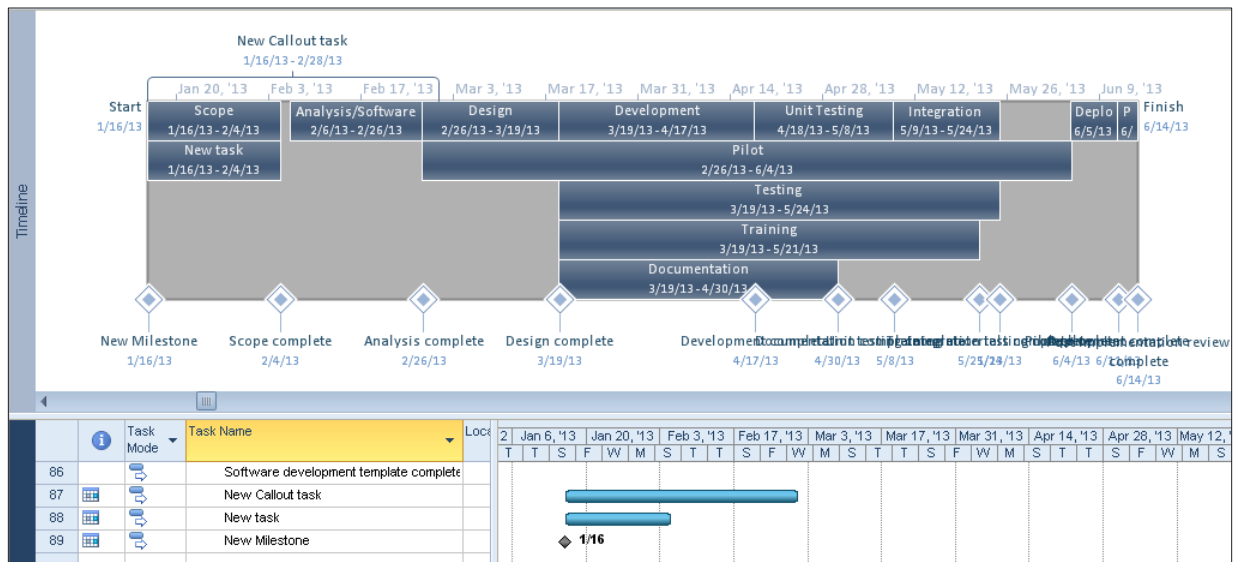


Figure 12-36 PLACEHOLDER

To display an existing task as a callout task:

- Click on a task in the Timeline view
- Click **Display as a Callout**

To display a Callout task as a bar:

- Click on the Callout task
- Click **Display as Bar**

To remove tasks from the Timeline view using the Timeline format bar:

- Click the task in the Timeline view
- Click **Remove from Timeline**

Tasks may be formatted and highlighted as necessary. Text styles and

format buttons are available on the Timeline format bar. Tasks may Changing the colors of the timeline bars is helpful when highlighting information.

To export a Timeline view to Outlook, Excel, Word, or Powerpoint to the clipboard:

- Click in the **Timeline** view
- Click **Copy timeline**
- Select copy choice:
  - For email
  - For presentation
  - Full size
- Navigate to destination
- Click **Copy**



Too much information results in a hard to read Timeline view. Select what is important and what will convey your message. The view will become more meaningful and will result in a useful reporting tool.

## Exporting Timeline View

As a reminder, Timeline view is great for visual executive summaries. To facilitate sharing information with executives, the Timeline may need to be exported to another application.



To add items to the Timeline, refer to *Customizing Timeline Views* on page 295.



Timeline view must be displayed before you can export it to another application. The simplest method is to click the Timeline checkbox on the View tab. If this option is unavailable, you may need to uncheck the Details checkbox on the same tab.

To copy a timeline:

1. Click inside the Timeline.

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2. In the **Timeline Tools, Format** tab, click on **Copy Timeline** and choose the desired option.

- **For e-mail** – Timeline size is reduced to fit into an Outlook message. Small size.
- **For presentation** – Optimized for a PowerPoint presentation. Medium size.
- **Full Size** – Uses the full size of the timeline as displayed in Project. Large size.

You can paste in Outlook to email it to peers or in PowerPoint to format it further.



You can also save the Timeline as an Adobe Acrobat file (see *Save as PDF* on page 271).

