Contents

Chapter 1 **Overview of Microsoft Project Supporting Project Management 1**
Overview 2
Project Management as a Discipline 3
The Project Management Goal 4
Microsoft Project Won't Solve 4
Microsoft Project is a Great Tool For 5
Microsoft Project and Core Competencies 6
Projects Most Likely to Fail 7
Major Risk Factors Leading to Project Failure 7
Overview of Project Program and Portfolio Management 9
Project Management 9
Program Management 10
Portfolio Management 10
Rolling Up Metrics for Project-to-Portfolio Management 11
Supporting Fact-Based Decision-Making 12
Project Lifecycle Management 13
Leveraging Technology for Project Management 15
Leveraging Technology for Project Lifecycle Management 16
Different Project Lifecycle Approaches 17
PMI (Waterfall) 17
Technical Lifecycles (Agile Methodologies) 18
Industry-Specific Lifecycles 19
Strategic Capability Planning 20
Microsoft's Project Management Solution 21
What is Project Server? 22
PMI's Practice Standard for Scheduling 23
Key Points to Remember 26

Chapter 2 **Overview of Microsoft Project 27**
Benefits of Scheduling Software 28
Overview of Project as a Database 30
Project Usage 33
Formulate a Strategy 34
Success Checklist 35
Project Desktop 2013 Overview of Versions 36

©2013 Advisicon, Inc.

Review of the Ribbon, Back Stage View, Quick Launch 38
Exploring the Ribbon 38
Backstage View (File Tab) 40
Overview of Common Views 43
Task Views 43
Resource Views 48
Popular View Adjustments and Navigation 53
Zooming In and Out 53
Hide or Insert a Column 54
Using the Scroll to Task Button 57
Go To and Find 58
Keyboard Shortcuts 59
Help 63

Chapter 3 **Start a Project 65**
Creating New Projects 66
How to Start a New Project Schedule 67
Saving a project 68
How to Save a New Project 69
Save or Save As, Share and Export 69
Opening a Project 73
How to Open a Project 74
Creating a New Project 74
Creating a Project from an Excel Workbook 77
Creating a Project from a SharePoint Task List 79
Saving the Schedule 80
Save As 81
Calendar Overview 84
How Calendars Work in Project 2013? 84
Setting Working Hours and Days 87
Setting Non-Working Hours and Days 90
Setting Calendar Options 95
Saving the Calendar 96
Project Information 98
Options 100
General vs Per Project Options 100
Scheduling Options 105
Definitions 105
Effort-driven scheduling 106
Understanding Task Types 106

©2013 Advisicon, Inc.

Scheduling Options 108

Chapter 4 **Task Development 111**
Project Life Cycle Approach to Scheduling 112
WBS Scheduling Approach 113
Agile Methodology Scheduling Approach 117
Waterfall (Project Lifecycle by Phase) Scheduling Approach 119
Creating the Work Breakdown Structure 122
Overview of Work Breakdown Structure 122
Guidelines for Creating a WBS 147
Milestones 150
Manual vs Automatic 152
Traditional or Automatic Scheduling 152
Manual Scheduling 152
When to Use Manual vs. Automatic Scheduling 153
Change to Auto Schedule 155
Key Points to Remember 158

Chapter 5 **Estimating, Linking and Lead and Lag 159**
Overview of Estimating 160
How Project 2013 Defines and Calculates Work and Duration 160
Estimating Techniques 161
What to Estimate? 161
Where Do the Estimates Come From? 162
How Do You Get Good Estimates? 162
Estimating for Unknown Resources 163
Entering Estimates 164
Concept of the Scheduling Engine 168
Sequencing 169
Creating Task Dependencies 171
Task Dependency Types 171
Task Relationships and Manually Scheduled Tasks 175
Best Practices for Using Dependencies 177
Lead & Lag 181
What is Lag Time? 181
What is Lead Time? 183
Best Practices Using Lead and Lag Time 186
Inactivate Tasks 188

©2013 Advisicon, Inc.

Chapter 6 **Constraints and Deadlines** **191**
Constraints 192
What are Constraints? 192
Constraint Types 193
Avoiding Accidental Constraints 196
Effects of Constraints 200
Deadlines 202
Task Deadlines 202
Split Tasks 208
Splitting Tasks 208
Task Calendar 212
Applying Task Calendars 212
Move Project 215
Moving the Entire Project Timeline 215
Task Notes 218
Adding Notes to Tasks 218

Chapter 7 **Resources** **221**
Work, Material, Cost: Resource Types 222
Work Resources 222
Cost Resources 223
Material Resources 224
Resource Sheet 225
Calendar 230
Material Resources 236
Cost Resource: Lite 237

Chapter 8 **Work Assignments** **239**
What is an Assignment? 240
Review of Task Types and Effort-Driven Scheduling 240
Task Type Scenarios 242
Scenario 1: Entering a Constant Duration Value 242
Scenario 2: Entering a Constant Work Value 244
Techniques to Assign Resources 246
Assignments Using the Resource Names Column 246
Assignments Using Task Information 247
Assignments Using the Assign Resources Dialog Box 247
Assignments Using Task Entry View 248
Fixed Work Assignments 249
Fixed Duration Assignments 252

©2013 Advisicon, Inc.

Fixed Unit Assignments 258

Chapter 9 **Fine Tune the Project Schedule 267**
Applying Groups and Filters to Views 268
How to Apply a Group 268
How to Apply a Column-Based Group 269
How to Remove a Group 269
How to Apply a Filter 269
How to Apply an AutoFilter 270
How to Apply a Highlight Filter 270
How to Remove All Filters 270
What are Groups? 271
Built-in Groups 272
Built-in Filters 274
Sorting Tasks or Resources in a View 278
How to Sort Information 279
How to Apply a Column Based Sort 279
How to Reset a Sort Back to Default 280
Critical Path 281
What is a Critical Path 281
Formatting Views to Display Critical Path 283
Viewing Resource Assignments 284
Resource Usage View 284
Task Usage View 285
How to Display Resource Usage View 285
How to Display Task Usage View 285
How to Adjust Information in the TimePhased Grid on Resource Usage or Task Usage View 286
Team Planner View 286
How to Display Team Planner View 287
Understanding Overallocations 290
Real World Application of Scheduling: Shortening the Schedule and Resolving Resource Conflicts 291
Shortening the Schedule 291
Resolving Resource Conflicts 292
Views to Identify Overallocations 293
Using Indicators 293
Using the Resource Allocation View 294
How to Display Resource Allocation View 295
Methods for Resolving Resource Conflicts 296

©2013 Advisicon, Inc.

Using Indicator Suggestions....296
Using Task Inspector 298
How to Apply Task Inspector....298
Changing Resource Assignments 300
Move a Task Until a Resource is Available 300
How to Move Tasks to Account for Resource Limitations 301
Assigning a Work Contour....301
Using the Team Planner View 302
Applying Leveling Features....304

Chapter 10 Baseline and Tracking 309
The Importance of Baselining....310
Setting a Baseline....311
Clearing a Baseline 313
Updating Baseline....315
Overview of Tracking 317
Tracking Activities With Project 318

Chapter 11 Printing and Reporting 327
Printing....328
Print Settings....328
Define Page Setup 336
Copy Picture 343
Save as Project file in .PDF format....346
Email a Project file as an Attachment....348
Refining Gantt Chart Formatting 350
Using the Format Tab....350
Formatting Text Styles 352
Formatting the Gantt Chart 355
Reporting 361
Visual Reports....361
Dashboard Reports....370
Timeline View Report 373

Appendix A Advisicon Services and Training 385
About Advisicon....386
Consulting and Training Services 386
Training Programs....389
Advisicon Project Management Courses 389

©2013 Advisicon, Inc.

Advisicon Microsoft Office Project Management Technology Courses 390
Advisicon Flowcharts 392
Advisicon Project Management Tools 396

©2013 Advisicon, Inc.