CHAPTER

3

Getting to Know Microsoft Project

Learning how to manage projects while also learning how to use Project 2013 is too much for most mortals. So this chapter starts with a simple map to show you around the program. The journey begins with launching Project 2013. After that, the chapter takes you on a tour of Project's ribbon tabs and the Quick Access toolbar. Then you'll wander through the panes that appear in the Project window.

This chapter wraps up with an explanation of Project's two modes for scheduling tasks. Some project managers want a simple tool they can use to craft a list of tasks and set the dates when they should occur. Other project managers want a scheduling engine that digests all the information they provide and spits out schedules. Project's *task modes* enable you to work whichever way you prefer. Manually Scheduled tasks wait for you to tell them when to start and finish. In contrast, with Auto Scheduled tasks, Project calculates your schedule using the task links, resource assignments, working calendars, and other details you specify. It's easy to set which task mode Project uses if you always use one or the other. But you can switch back and forth anytime you want or change a task's setting at any time.

Launching Project 2013

All you have to do to launch Project is choose Start→All Programs→Microsoft Office 2013→Project 2013 (for standard Microsoft Office installations). Unlike earlier versions, Project 2013 opens to Backstage view, which is where you create new Project files, open existing ones, and perform a few other actions. If you've opened Project files before, you see them listed under the Recent heading on the left side of the view.

For the purposes of this tour, simply click Blank Project on the right side of the view to create a new, blank project. Chapter 5 provides the full scoop on creating and opening Project files.

Getting Around Project

The Project window is chockablock with panes and other parts that either display the information you want to see or help you work faster. Some features—like the ribbon, the main Project view, and the status bar—are always available, while others—like the Task Inspector pane—stay hidden until you need them. This section shows you all the components within the Project window and how to make them work for you.

Navigating the Ribbon and the Quick Access Toolbar

Project's ribbon is like a cyber border collie, herding related features onto tabs to make them easier to find, as shown in Figure 3-1. As you plan and manage a project, you shift your focus from tasks to the resources who work on them to the big picture of the entire project, so the Task tab, Resource tab, and Project tab make perfect sense. You'll also turn to a few other tabs as you work with your Project files and look at your projects in different ways. This section steps through the seven tabs that appear when you launch Project 2013 for the first time and explains how to use and customize the Quick Access toolbar. (See page 686 to learn how to add other tabs to the ribbon or to create your own custom tabs.)

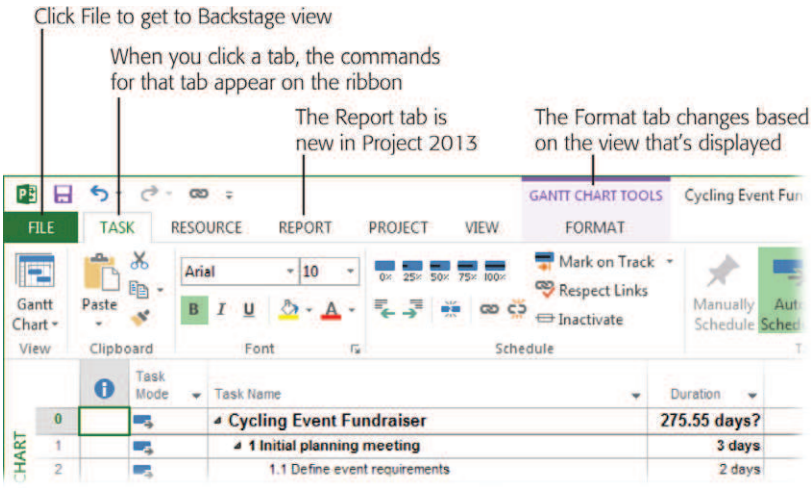

FIGURE 3-1

The ribbon tabs appear near the top of the Project window. Click the File tab, and Backstage view takes over. Click any other tab, like the Task tab shown here, and you see the ribbon across the top of the program window while a Project view fills the rest.

MANAGING FILES IN BACKSTAGE VIEW

The File menu from Project 2007 and earlier versions is now the File tab on the ribbon. When you click this tab, Project opens *Backstage view*. When you click a command on the left side of the Backstage view screen, it takes over the entire Project window, as you can see in Figure 3-2. For example, when you click New, Backstage view presents several ways to create a new file (page 87).

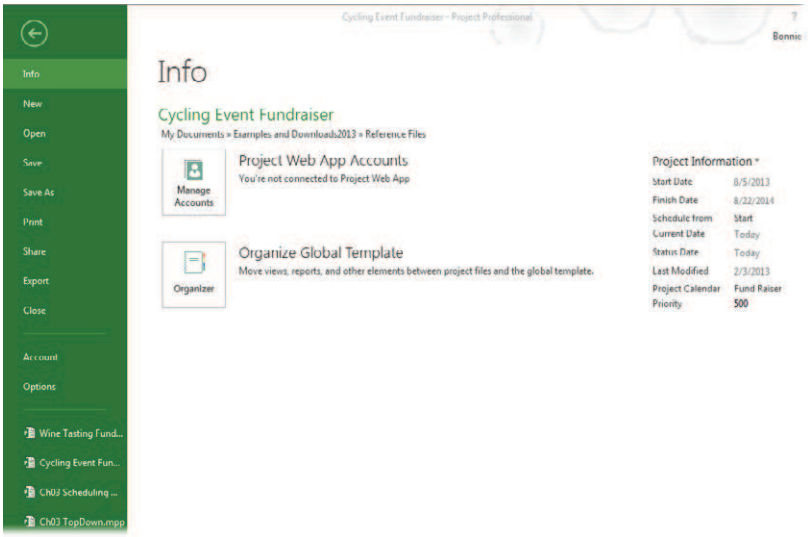

FIGURE 3-2

When you click the File tab, the ribbon tabs disappear and Backstage view takes over. After you finish working in Backstage view, you can return to the Project ribbon by clicking the arrow at the top left of the screen.

Some of the commands listed in Backstage view should be familiar: Save, Save As, Open, Close, and Exit. For the most part, they do what they've always done. (Chapter 5 describes the new tricks they've learned for Project 2013.) The other entries in Backstage view let you do even more. You'll learn about them in other chapters of the book, but here's a quick intro:

- **Info.** Clicking this entry opens the Info page, which displays information about the active Project file, such as its start and finish date, on the right side of this page. Click Project Information and choose Project Statistics to see the project's scheduled, baseline, and actual values. This page also includes an Organizer button that lets you copy project elements between files (page 702). And if you use Project Server and Project Web App, you can access Project Web App accounts, assign permissions, and publish project progress to Project Web App from this page.
- **New.** This page offers several ways to create a new file (page 87), including starting from scratch with a blank project; using a template; or creating a file from an existing project, an Excel workbook, or a SharePoint task list. If you want some serious handholding to get started, in the page's list of templates, click the "Welcome to Project" icon. Page 85 describes this step-by-step template in detail.

- **Open.** The Open page, shown in Figure 3-3, has been revamped in Project 2013, so it's easy to access your Project files, whether they're stored on your computer or in the cloud. Click Recent Projects to see a list of all the projects you've opened lately. If you open a lot of Project files—say, as you write a book about Project—this is the quickest way to reopen a file. File locations in the cloud, such as SkyDrive or Office 365 SharePoint, appear below the Recent Projects entry. You can add other storage locations by clicking "Add a Place." If you use Project Server or subscribe to Project Online (an online Microsoft service for managing project portfolios and collaborating with project teams), you can also share your file to Project Server or Project Online. For files stored on your trusty computer, click Computer.

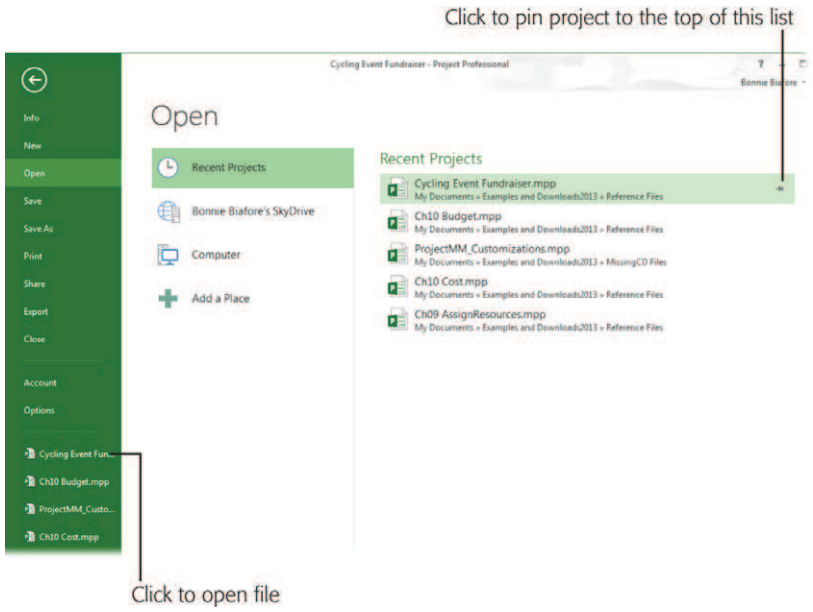

FIGURE 3-3

For even easier access, a few of your most recently opened files appear at the bottom of the Backstage menu. Simply click a file's name to open the file. If you work on a project for months at a time, you can pin it to the top of the Recent Projects list by clicking the pushpin icon to the right of the filename.

TIP To change how many projects appear at the bottom of the Backstage menu, display Backstage view by clicking the File tab, and then click Options. On the left side of the Project Options dialog box, click Advanced, and then scroll to the Display section. Turn on the "Quickly access this number of Recent Projects" checkbox and then, in the box to its right, type the number you want.

- **Print.** The Print page looks like a spiffed-up version of the familiar Print dialog box. This page lets you select a printer, specify print settings like paper orientation, and choose page setup options like margins (page 484). If you rarely touch any of those settings, you can simply choose the number of copies and click the big Print button at the top of the page. If you don't have a widescreen

monitor, the Print page leaves little room for a preview of what you're printing, and you can't shrink the print options area. See page 502 to learn how to work around this limitation.

- **Share.** As its name implies, this page offers features for sharing Project files. You can synchronize your Project file with a SharePoint Tasks List (see online-only Chapter 25, available from this book's Missing CD page at *www.missingmanuals.com/cds*) or send it as an email attachment (page 562).
- **Options.** Click Options to open the Project Options dialog box and choose settings to tell the program how you'd like it to behave.
- **Export.** Despite its name, this page offers several methods for saving a project in other file formats, such as PDF, XPS, older Project formats, project templates, Excel, XML, and so on.
- **Close.** Click this command to close the active Project file.
- **Account.** This page displays the information about the Microsoft account you use to log into Project 2013 and access connected services like SkyDrive. (You set up a Microsoft account during installation, if you don't already have one.) Click the About Project button on this page to see which version of the program you have.

A TOUR OF THE OTHER RIBBON TABS

Project management's focus on projects, tasks, and resources is a natural fit for tabs on the ribbon. The ribbon groups features into tabs that, for the most part, are logically organized. Here's a quick introduction to the rest of the tabs on the Project ribbon besides the File tab (you'll learn about each one in detail throughout this book).

- The **Task tab** is your first stop after creating a Project file. It's home to commands for creating tasks (subtasks, summary tasks, and milestones), linking them to one another, and rearranging them into an outline. The first section on this tab lets you choose popular task-oriented views like Gantt Chart. You can also use this tab to format tasks, copy and paste them, or look at their details. This tab also includes the incredibly useful "Scroll to Task" command, which scrolls the view timescale (page 337) until the selected task's task bar is visible. While the project is under way, you can use commands on this tab to move tasks to new dates, to update task progress, and to investigate scheduling issues.
- The **Resource tab** is next up in the project-scheduling lineup, because you need resources to complete the work. This tab has a section for choosing popular resource-oriented views, like Resource Sheet and Team Planner (page 240). Whether you're adding resources to a project, assigning them to tasks, or leveling them to remove overallocations, this is the tab you want. It also contains commands for setting up, refreshing, and updating a resource pool (page 525) so you can share resources among several projects. If you use Project Server, this tab has the commands for accessing the Enterprise Resource Pool and substituting resources.

- The **Report tab** is new in Project 2013 and was added to go along with the new reports that the program provides. (Text reports are no longer available in Project 2013.) This tab includes several categories of built-in reports, such as Dashboards, Resources, and Costs. You can also create visual reports, create your own customized reports, or compare two Project files. Chapter 16 has the complete details on running and customizing reports.
- The **Project tab** is a catch-all for commands to fine-tune your project: viewing project information, defining work calendars, setting project baselines, inserting subprojects, creating links between projects, and so on. This is also the tab to select if you want to work on custom fields or your WBS codes. In addition, you can find commands here to set the project's status date and to update the project in certain situations (page 422).
- The **View tab** starts with buttons for the most popular task and resource views, but you can also access the More Views dialog box to choose any view you want. This tab has commands for controlling what information you see in a view: how many levels in the outline; the table applied; highlighting; how the view's contents are filtered, grouped, or sorted; and the time periods used in the timescale. You can turn the Timeline pane and the Details pane on and off and choose the view that appears in the Details pane (page 189). You can also switch between windows and arrange windows from this tab. The only command that doesn't seem to belong on this tab is in the last section: You choose Macros to run macros.
- The **Format tab** is a chameleon that offers different formatting commands depending on the view that's active. For example, when Gantt Chart view is applied, the Gantt Chart Tools | Format tab lets you insert columns in the table, format task bars and text styles, display elements like summary tasks or critical tasks, and so on. When you switch to Timeline view, the Timeline Tools | Format tab lets you add tasks to the timeline and format them. For Resource Usage view, the Resource Usage Tools | Format tab has checkboxes that let you control which fields you see in the time-phased data grid.

FINDING COMMANDS ON THE RIBBON

If you can't find the command you want on the ribbon, you may be looking in the wrong place—or the command simply might not *be* on the ribbon. To see where a command resides on the ribbon, do the following:

1. **Right-click anywhere on the ribbon, and then choose "Customize the Ribbon" on the drop-down menu.**

   The Project Options dialog box opens to the Customize Ribbon screen.

2. **Click the down arrow to the right of the "Choose commands from" box, and then choose All Commands.**

   The list box below the "Choose commands from" box displays the complete list of Project commands.

TIP To determine whether you can't find a command because it isn't on the ribbon, in the "Choose commands from" drop-down list, choose "Commands Not in the Ribbon." If you find the command you're looking for in the list, you have to add it to a custom group (page 689) to use it.

3. **Scroll to the command you're looking for and position your pointer over the command's name.**

   A tooltip appears that tells you the ribbon tab, group, and name of the command. For example, if you point at the Assign Resources command, the tooltip reads "Resource tab | Assignments | Assign Resources (ResourcesAssign)," which means that the command is on the Resource tab in the Assignments section, and the command is labeled Assign Resources. The text in parentheses ("ResourcesAssign" in this example) is the name of the command if you're using Visual Basic.

TIP Chapter 22 explains how you can customize the ribbon to add tabs, sections (technically called custom groups), and commands.

TAMING THE PROJECT RIBBON

The ribbon takes up a broader swath at the top of the main Project window than the menu bar used to. If you want to reserve your screen real estate for your project schedule, the ribbon will obligingly take up less space. This section describes a couple of methods for reducing the size of the ribbon.

Once you're familiar with which commands reside on which tabs, you can collapse the ribbon to a trimmer profile. To collapse the ribbon to something more like the old menu bar, use any of these methods:

- Double-click the active ribbon tab.
- Right-click the ribbon and then choose "Collapse the Ribbon."
- Click the up arrow at the bottom right of the ribbon.

Choosing commands when the ribbon is collapsed is almost the same as choosing them when the ribbon is visible. To choose a feature on a tab, click the tab's name (the tab appears). Choose the command you want, and the tab disappears. The only difference is that you have to click the tab to open it each time you want to choose a command on it, even if you want to use two commands in a row that are on the same tab. For example, to change the task mode to Auto Scheduled and then insert a new task, you would first click the Task tab, and then, in the Tasks section, click Auto Schedule. Project would then collapse the ribbon, so you'd have to click the Task tab again, and in the Insert section, click Task.

To switch back to keeping the ribbon in view, double-click anywhere on the collapsed ribbon, or right-click any tab name, and then choose "Collapse the Ribbon."

The ribbon also contorts itself to fit as you resize the Project window (see Figure 3-4). For example, if you narrow the window, the ribbon makes some buttons smaller by shrinking their icons or leaving out the icons' text. If you narrow the window dramatically, an entire section may be replaced by a single button. When you click the button, a drop-down panel displays all the hidden commands.

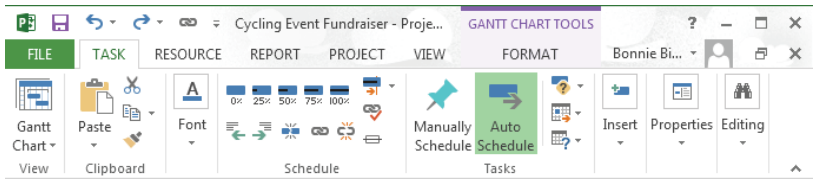

FIGURE 3-4

When you shrink the Project window, the ribbon rearranges sections and buttons to fit. Some buttons just get smaller. If the window is very narrow, sections turn into buttons (like Insert in this example). Click this button and the hidden commands appear in a drop-down panel.

TIP If you prefer to keep your fingers on the keyboard, you can trigger ribbon commands without the mouse. To unlock these nifty shortcuts, press the Alt key. Letters appear below each tab on the ribbon. Press a key to pick a tab, and Project then displays letters under every button on that tab. Continue pressing the corresponding keys until you trigger the command you want. For example, to insert a task with the Insert Task command, press Alt, and then press the H key to open the Task tab. You see the letters "TA" below the Task button in the Insert section, so press the T key followed by the A key to display the drop-down menu. To insert a task, press T again. See page 745 to get the full scoop on keyboard accelerators.

WORK QUICKER WITH THE QUICK ACCESS TOOLBAR

The Quick Access toolbar is so small that you might not notice it above the File and Task tabs (see Figure 3-5). But it's always visible, so it's a handy place for your favorite commands. (In addition, it keeps you from having to jump from tab to tab to get to your favorites.) Out of the box, it has icons for Save, Undo, and Redo, because people use these commands so often. To add more commands, click the down arrow on the right end of the toolbar, and then, on the drop-down menu (shown in Figure 3-5), choose the command you want to add. For example, to make views easy to select, choose View on the drop-down menu. Then you can click the down arrow in the View box and choose the view you want to display.

TIP To make the Quick Access toolbar even easier to reach, click the down arrow on the right end of the toolbar, and then, on the drop-down menu, choose "Show Below the Ribbon." When you do that, the toolbar snuggles up underneath the left side of the ribbon.

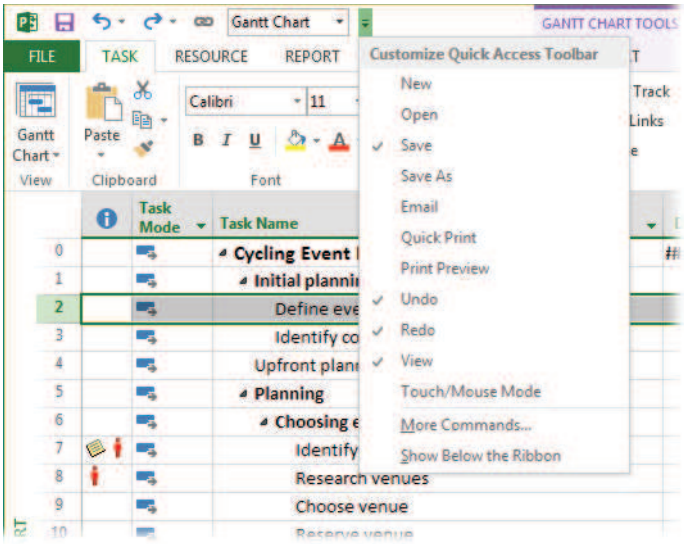

FIGURE 3-5

To add a command to the Quick Access toolbar, click the down arrow at the right end of the toolbar. Click the command you want to add to turn on its checkmark. For example, the View checkmark is turned on here, so the View box appears in the toolbar. (In this example, it indicates that Gantt Chart view is displayed.) To position the Quick Access toolbar below the ribbon instead of above it, choose "Show Below the Ribbon."

NOTE You can add any command you want to the Quick Access toolbar. On the ribbon, right-click the command you want to add to the Quick Access toolbar, and then choose "Add to Quick Access Toolbar."

Working with Views

Managing projects means looking at information in many different ways, which explains all the built-in views Project offers. These views come with a lot of moving parts. This section explains what each one does and how to choose the view you want.

CHOOSING A VIEW

Over the life of a project, you need to look at its data in different ways, so it's no surprise that you frequently change the view you're looking at. For that reason, Project has buttons for choosing views in several locations on the ribbon. Here are your choices:

- **The Task tab.** To choose a view in this tab, head to the View section, click the bottom half of the Gantt Chart button, and then choose the view you want from the drop-down menu. If the view you want isn't listed, then choose More Views at the bottom of the menu. In the More Views dialog box, double-click the view you want to apply.

- **The Resource tab.** In this tab's View section, click the bottom half of the Team Planner button, and then choose the view you want from the drop-down menu. You can also choose More Views at the bottom of the menu to open the More View dialog box so you can choose *any* view that's in your Project file or global template (page 697).
- **The View tab.** This tab (shown in Figure 3-6) has two sections devoted to choosing views. The Task Views section contains buttons to display Gantt Chart view, Task Usage view, Network Diagram view, Calendar view, and Task Form view. In the Resource Views section, click the appropriate button to apply Team Planner view, Resource Usage view, or Resource Sheet view. If you want to apply a view that doesn't have a button, click the down arrow on any of these buttons, and then choose More Views on the drop-down menu that appears.

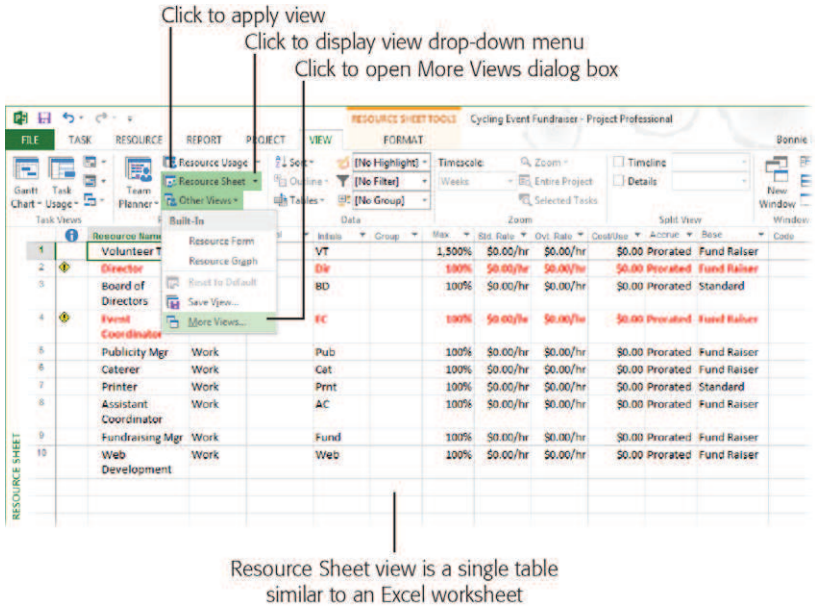

FIGURE 3-6
The View tab has one section for choosing task-oriented views and another section for resource-oriented views. Click a button to apply the corresponding view, or click the button's down arrow to choose a view from the drop-down menu. Choosing More Views on any view drop-down menu opens the More Views dialog box, where you can apply any view in your project by double-clicking its name.

NOTE If you've created any custom views (page 598), the view drop-down menus on the Task, Resource, and View tabs include two headings: Custom and Built-In. (If you haven't created any custom views, you see only the Built-In heading.) The views listed below the Custom heading are custom views that you've created or copied into your Project file from another file. The views listed below the Built-In heading are the views that come with Project.

- **The Quick Access toolbar.** You can add a view drop-down list to this toolbar so you can choose a view without switching tabs. To do this, click the down arrow to the right of the toolbar and then click View to turn on its checkmark.

The View box appears in the toolbar. Click the down arrow to the right of the View box, and then choose the view you want from the drop-down list. To apply a view that's not listed there, choose More Views at the bottom of the menu.

TIP If you're a Project old-timer, you might wonder what happened to the View Bar, a narrow bar that contains buttons for many popular views. It's still available as long as you know how to retrieve it. Right-click just inside the left border of the main Project window (for example, right-click the view name that's positioned vertically on the left side of the view), and then choose View Bar at the bottom of the view shortcut menu that appears. The View Bar appears on the left side of the window. Click an icon to apply the corresponding view.

THE ANATOMY OF PROJECT VIEWS

Some views, like Resource Sheet view and Task Sheet view, are like giant tables, similar to Excel worksheets, as you can see in Figure 3-6. But most views have a left and a right pane. For views like Gantt Chart and Task Usage, the left side of the view is a table with field values in the columns, as shown in Figure 3-7. The rows show tasks, resources, or assignments. You can add or edit values directly in the table or use it simply for reviewing. The pane on the right side is called the *timescale* and shows values by time period. In a Gantt Chart view, task bars in the timescale show when tasks begin and end. Task Usage view's timescale uses a time-phased table instead, in which the columns represent time periods.

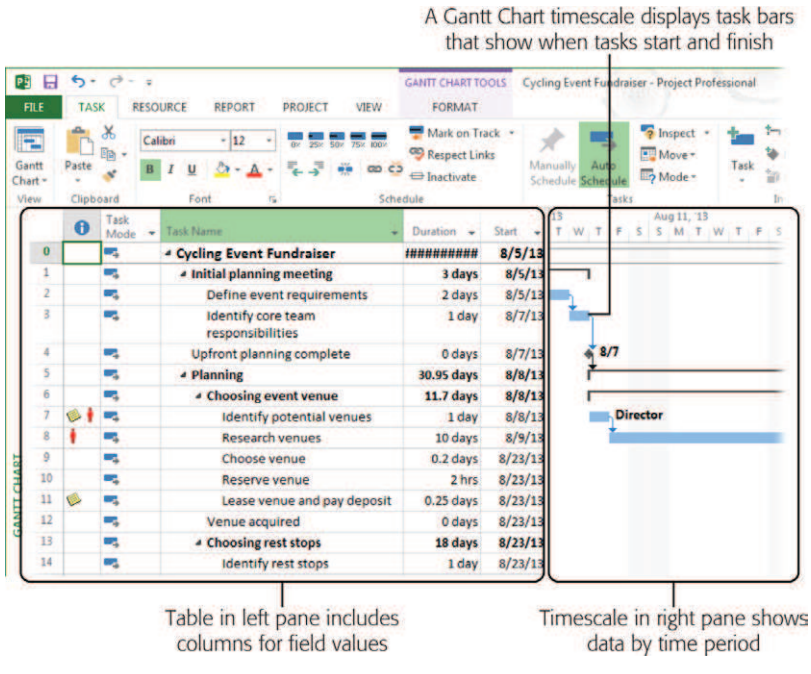

FIGURE 3-7
Most views have a left and a right pane, as shown here. The left pane is a table similar to the single giant table in Resource Sheet view with rows for tasks, resources, or assignments, and columns for field values. The right pane is a timescale that shows data over time. Here, Gantt Chart view displays task bars in the timescale that indicate when tasks start and finish.

But that's not all! You can tell Project to display *two* views, one above the other. The top pane of this double-decker arrangement is called the primary pane, whereas the bottom pane is called the Details pane. Figure 3-8 shows Gantt Chart view in the primary pane and Resource Graph view in the Details pane. The Details pane shows detailed information about the task, resource, or assignment that's selected in the top pane. To display the Details pane, in the View tab's Split View section, turn on the Details checkbox, and then choose the view you want in the Details pane from the drop-down list.

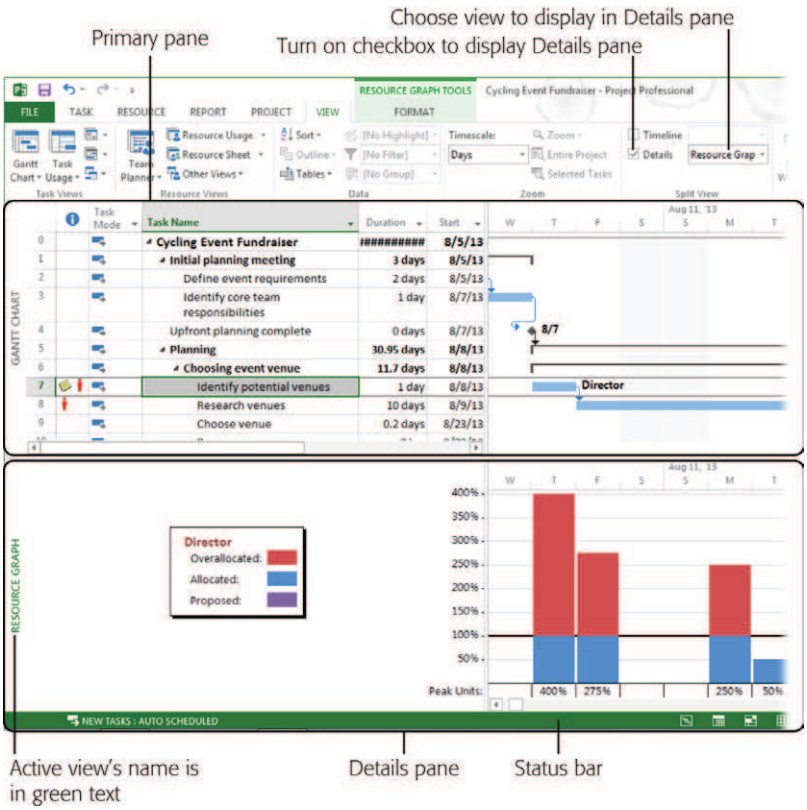

FIGURE 3-8

The Project window has convenient shortcuts tucked away in every corner and most places in between. The status bar shows information about your project, like the task mode (page 59) you've selected. On the right side of the status bar, you can click icons for popular Project views or drag the Zoom slider to change the timescale in the current view.

Project's views come in single and combination variations. A single view is simply one Project view that you can choose to display in the primary pane or the Details pane. Combination views, on the other hand, contain *two* single views: one on top and one in the Details pane. The built-in Task Entry view, for example, has Gantt Chart view (a single view) on top and Task Form view (another single view) in the Details pane. The box on page 57 explains how to apply views and switch between one and two panes.

NOTE The actions you can perform in Project depend on whether the primary or Details pane is active. If you select a new view, then Project replaces the view in the active pane with the one you selected. You can tell which pane is currently active because its name is displayed to the left of the pane in green text (see Figure 3-8); the inactive pane's name is displayed in gray text.

Just to keep life interesting, Project also has *task panes* (no relation to view panes) for different project-related activities. For example, when you choose Task→Tasks→ Inspect, the Task Inspector pane appears to the left of your views (see page 307).

UP TO SPEED

One Pane or Two?

Even if you apply a combination view that comes with one view in the primary pane and another view in the Details pane, you can tell Project whether you want to see both the primary pane and the Details pane, or only the primary pane. For example, if you're using a combination view like Task Entry (Gantt Chart on top and Task Form in the Details pane), you can hide the Details pane to concentrate on task dependencies in Gantt Chart view or restore the Details pane to simplify editing tasks. When both panes are visible and you select a single view, Project applies the view to the active pane and keeps the other pane as it is.

To show or hide the Details pane, in the View tab's Split View section, turn the Details checkbox on or off. When you turn the checkbox on, in the drop-down list, choose the view you want to see in the Details pane. (Less obvious controls are also available to hide and show panes. If both panes are visible, you can hide the Details pane by double-clicking the horizontal divider between the two panes. To bring the Details pane back, you can double-click the box immediately below the vertical scroll bar on the right side of the Project window, shown in Figure 3-9. You can also adjust the height of the panes by moving your cursor over the horizontal divider; when the cursor turns into a two-headed arrow, drag up or down until the panes are the height you want.)

As if the primary pane and the Details pane weren't sufficiently overwhelming, there's another pane you can display: Timeline view (in the view tab's Split View section, turn on the Timeline checkbox), which appears in its own special pane above the primary pane. (See page 619 to get the full story on Timeline view.) However, you can see only two panes at a time, which means you have to choose between Timeline view's pane and the Details pane. If the Details pane is visible and you turn on the Timeline checkbox, then Project automatically hides the Details pane (and turns off the Details checkbox). Similarly, if Timeline view's pane is visible and you turn on the Details checkbox, Project hides Timeline view's pane.

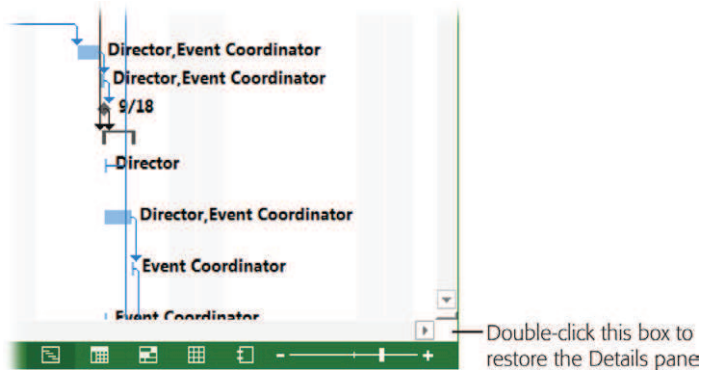

FIGURE 3-9

When you hide the Details pane, it waits patiently to reappear. You can change the view in the top pane as many times as you want. When you restore the bottom pane, it shows the view it contained when you hid it.

ScreenTips and Smart Tags

ScreenTips and Smart Tags are two Project features that make only temporary appearances. ScreenTips blossom into view when you position the mouse pointer over certain items onscreen, like the icons in the Indicators column in a table (that's the column whose header is an i in a blue circle). The ScreenTip for a date constraint icon tells you the type of constraint and the date. A Task Note icon displays a ScreenTip with part of the note. When you put your pointer over a button on the ribbon, a ScreenTip appears with a description of the command and the keyboard shortcut for triggering it. To learn about the purpose of a Project field or how it's calculated, position the pointer over a column header and read the ScreenTip that appears.

Smart Tags, on the other hand, appear when you perform certain Project actions that have a reputation for confusing beginners. For example, if you select a Task Name cell in a table and then press the Delete key, a Smart Tag appears to the left of the cell. When you click the Smart Tag's down arrow, Project displays options for deleting just the task name or the entire task, as illustrated in Figure 3-10. The Smart Tag icon you see depends on what you're trying to do. For example, if you edit a task's duration, then the icon is an exclamation point inside a yellow diamond.

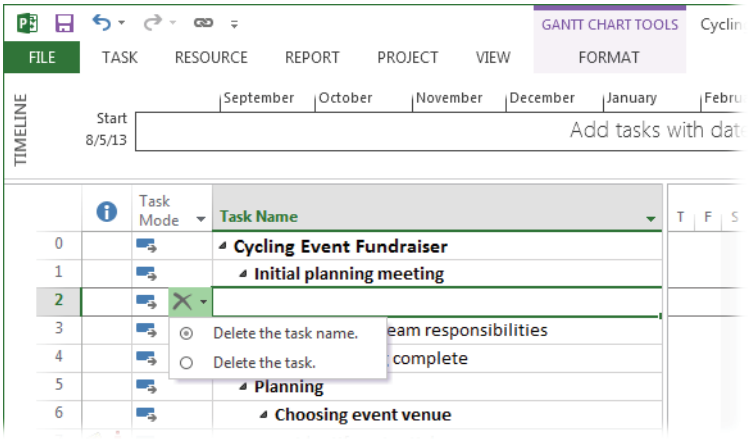

FIGURE 3-10

Smart Tags also appear when you edit a task's start or finish date, asking if you want to set a date constraint for the task (page 189). Similarly, if you change the duration, work, units, or resources assigned to a task, Smart Tags help you tell Project the results you want.

TIP Once you know Project inside and out, you probably don't need the help that Smart Tags offer. In that case, you can turn off different types of Smart Tags. To do that, click the File tab, and then choose Options. On the left side of the Project Options dialog box, choose Display. In the "Show indicators and options buttons for" section, turn off the checkboxes for the Smart Tags you don't want. Turning off the "Resource assignments" checkbox removes the Smart Tags that appear when Project needs more info about how to adjust a task when you change its resource assignments (such as shortening duration or increasing work). Turning off the "Edits to work, units, or duration" checkbox hides the Smart Tags that appear when you change a task's work, duration, or units and Project needs to know what you're trying to accomplish. Similarly, the "Edits to start and finish date" checkbox controls whether Smart Tags prompt you for more info when you change a task's date. And the "Deletions in the Name column" controls the Smart Tag that asks if you want to delete the task name or the entire task when you select a Task Name cell and then press the Delete key.

Scheduling Manually or Automatically

In Project 2010, Microsoft introduced *task modes*, which let you choose whether *you* want to control when tasks start and finish (Manually Scheduled) or whether you want Project to calculate start and finish dates automatically (Auto Scheduled). Before that feature was introduced, all tasks were automatically scheduled. Although automatic scheduling is a huge help for projects with lots of tasks and resources, manual scheduling can help in several ways. This section describes what both task modes can do and how to decide which one you want.

Manually Scheduling Tasks

Out of the box, Project comes with Manually Scheduled mode turned on for all new tasks. If you're new to project management, you can leave that option alone and merrily set the dates for the tasks in your project.

But to seasoned project managers, manual scheduling sounds like heresy. After all, the point of using project-management software is to let a computer calculate the project schedule and adjust the schedule automatically as you change tasks, resource assignments, and so on. But manually scheduled tasks come in handy for several common project-management situations, like at the beginning of a project when you have a paucity of info, or when you're planning from the top down with timeframes handed down from management. This section describes the different ways you can put manually scheduled tasks to work.

SETTING THE START AND FINISH DATE FOR A TASK

Every so often, you run into a task that *must* occur on a specific date—for example, a training class for team members or a company-wide meeting. With a manually scheduled task, you can pin the start or finish date, or both, to the calendar dates you want; page 187 tells you how. (Project's date constraint feature [page 189] is another method for setting either a task's start or finish date—but not both.)

CREATING TASKS WITH INCOMPLETE INFORMATION

One challenge early in project planning is trying to define tasks and build a schedule when you don't have all the information you need. For example, you may not know how long some tasks will take or when other tasks must occur. With manually scheduled tasks, you can fill in the information you *do* know and leave the rest blank without Project complaining. For example, you might know that a task has to start on January 14, but you don't know how long it will take. In situations like this, you can type notes in the date or duration fields to jog your memory when you fill in the missing information later. As you can see in Figure 3-11, Project 2013 uses colors, taskbar formats, and end-caps on task bars to indicate what information a task includes.

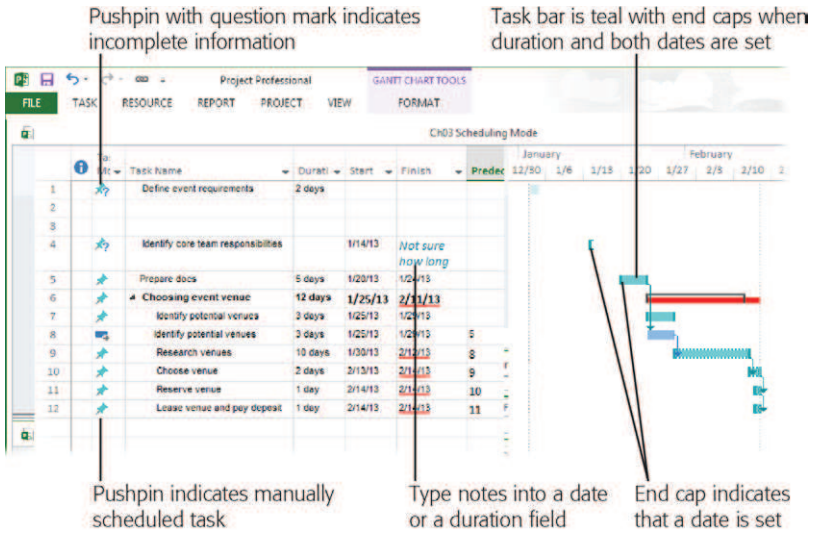

FIGURE 3-11

Out of the box, Manually Scheduled task bars are teal with darker end-caps for dates that you specify. Manually scheduled summary tasks use black brackets to indicate the durations you enter. If the subtasks take longer than their summary task's duration, the rolled-up summary task bar that shows the duration of all the subtasks turns red.

Here's what happens when you create manually scheduled tasks with different types of information:

- **Set task duration.** If you set the duration for a manually scheduled task without setting either the task's start or finish date (as is the case for the first task listed in Figure 3-11), Project draws a task bar starting at the project's start date with the duration you specify. The task bar doesn't have end-caps because you haven't defined either date. In addition, the task bar is a light blue and faded at each end.

TIP As you find out more about project tasks, you can filter your task list to display only the tasks without dates. To filter the list for tasks without a start or finish date, in the View tab's Data section, click the Filter down arrow and then choose More Filters. In the More Filters dialog box, double-click the Tasks Without Dates filter (or select the Tasks Without Dates filter and then click Apply).

- **One date set.** When you specify a date (either Start or Finish) for a manually scheduled task, Project draws an end-cap at that end of the task bar, as you can see with the second task listed in Figure 3-11.

- **Notes entered in a date or duration field.** If you don't know the value for a date or duration field but you have some information about the value, you can type placeholder notes in the field. For example, in the second task in Figure 3-11, the start date is set, but the duration is uncertain, so there's a note about that. When you determine the task's duration or finish date, simply fill in the value, and Project adds end-caps or colors to the task bar to indicate that the value is now present.
- **Two of three values set.** If you specify two of the three values Project needs to schedule a task (Start, Finish, and Duration), it calculates the third value. For example, if you set the Start and Finish dates, Project calculates the duration. Or you can set one date and the duration and let Project calculate the other date. In this case, the task bar is teal with darker end-caps, as shown for the third task listed in Figure 3-11.

PLANNING FROM THE TOP DOWN

Executives and project customers have a habit of telling you how long you have to complete a project long before you know whether that length of time is sufficient. If you're planning a project based on timeframes you've been given by someone else, you can use manually scheduled tasks to schedule from the top down. To do this, you create manually scheduled summary tasks with the duration and dates you're trying to meet. Then you create subtasks within those summary tasks. As you add the subtasks for all the project work, you can see whether they fit within the summary-task duration or run over the allotted time (see Figure 3-12).

Here's how you plan from the top down:

1. **Set Project's task mode to Manually Scheduled by clicking New Tasks in the status bar at the bottom of the Project window and then choosing Manually Scheduled.**

   Project will now create all new tasks as manually scheduled until you change the task mode (page 64).

2. **To add a new summary task, click the table row below where you want the new task to go, and then, in the Task tab's Insert section, click Summary.**

   Project inserts two new rows, one for the summary task (and gives it the placeholder name "<New summary task>") and one for a subtask ("<New Task>"). The program selects the Task Name cell for the new summary task. Type the summary task's name, and then press Enter. Project selects the Task Name cell for the new subtask. Type the name of the subtask.

3. **In the summary task's Duration cell, type the duration you've been given for the summary task.**

   In the timescale pane, Project draws an elongated black bracket the length of the duration that starts at the project's start date (the current date or the start date you specify, as described on page 90). If you type a date in the Start field, the bracket moves to start at that date.

4. **Add subtasks to the summary task.**

   You can create subtasks as manually scheduled or auto-scheduled and create task dependencies between them. Project keeps track of the duration you specified for the summary task and the total duration of all the subtasks, as you can see in Figure 3-12. The task bar immediately below the summary-task bracket shows the rolled-up duration of all the subtasks, which is drawn between the Scheduled Start and Scheduled Finish dates, although these fields don't appear in the view's table. (For a manually scheduled task, the Scheduled Start and Scheduled Finish fields are read-only and contain the dates that Project recommends for the task's start and finish. Most of the time, the Scheduled Start and Scheduled Finish values are the same as the task's Start and Finish values.)

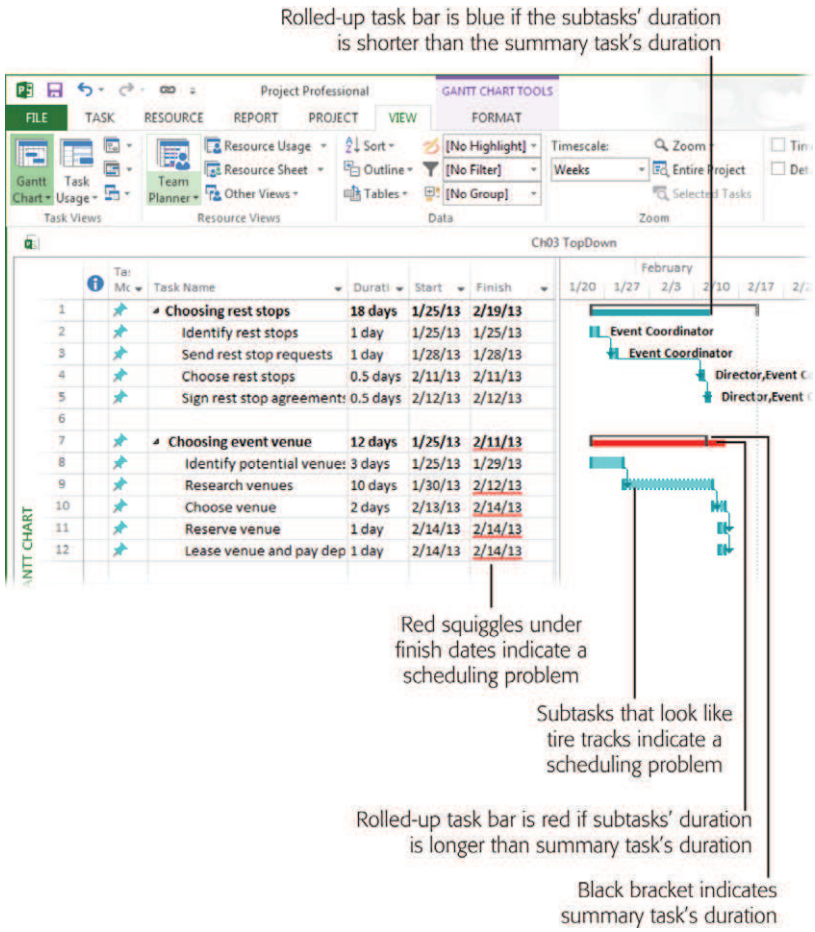

FIGURE 3-12

If the total duration of the subtask is shorter than the summary task's duration, the rolled-up task bar is blue to indicate that you have extra buffer time, as shown for the task in row 1 here. If the total duration of the subtask is longer than the summary task's duration, the rolled-up task bar is red, as illustrated by the task in row 7. If a subtask finishes later than the summary task's finish date, the subtask task bar looks like a tire track, as you can see for the task in row 9. In addition, red squiggles under the summary and subtask finish dates in rows 7 and 9–12 indicate a scheduling problem (in this case, the subtasks end after the summary task's finish date).

Automatically Scheduling Tasks

If you're a project-management veteran, you'll probably want to change the Project's task mode to Auto Scheduled. That way, Project takes care of calculating when tasks start and finish. With auto-scheduled tasks, Project automatically makes the first task's start date the same as the project's start date. When you specify the task's duration, Project calculates its finish date. Then, as you link tasks, assign resources, and add the occasional date constraint (page 189), Project recalculates the schedule for you.

TIP You can specify whether auto-scheduled tasks start on the project's start date or the date on which you create the task. To do that, choose File→Options. On the left side of the Project Options dialog box, choose Schedule. In the "Auto scheduled tasks scheduled on" drop-down list, choose Project Start Date or Current Date.

If you use Project's automatic scheduling, resist the temptation to specify start or finish dates for tasks, or you'll lose one of the advantages of using Project's scheduling engine in the first place. Project calculates dates for you based on the sequence and duration of tasks. If you enter dates for tasks, the resulting date constraints (page 189) make your schedule inflexible and difficult to maintain.

Setting the Task Mode

Depending on whether you usually work on small informal projects or monster schedules, you'll probably work primarily in one task mode or the other. But you can also mix and match manually scheduled tasks and auto-scheduled tasks to your heart's content, as you'll soon see. This section tells you how to set the task mode you want to use.

SETTING THE TASK MODE FOR NEW TASKS

By default, Project's task mode option for new tasks is set to Manually Scheduled. The fastest way to change the mode Project uses for new tasks is to head to the status bar at the bottom of the Project window, click "New Tasks: [task mode]" (where [task mode] is the task mode that's currently set), and then choose either Auto Scheduled or Manually Scheduled. If you have other settings you want to change, you can change the mode Project uses for new tasks in the Project Options dialog box.

Here's how:

1. **Choose File→Options. On the left side of the Project Options dialog box, choose Schedule.**

   The scheduling options you can control appear in the Project Options dialog box.

2. **Next to the "Scheduling options for this project" heading (Figure 3-13), choose which project(s) you want this task-mode setting to apply to.**

   You can choose any Project file that's currently open or All New Projects.

3. **Below the "Scheduling options for this project" heading, in the "New tasks created" drop-down list, choose the task mode you want Project to assign to new tasks.**

   Initially, this box is set to Manually Scheduled, as shown in Figure 3-13. If you want new tasks to be automatically scheduled, then choose Auto Scheduled instead.

4. **If you chose Auto Scheduled, then in the "Auto scheduled tasks scheduled on" drop-down list, choose the date you want Project to use for new auto-scheduled tasks.**

   Choose Project Start Date if you want new auto-scheduled tasks to start on the project's start date (page 90). Choose Current Date to create auto-scheduled tasks starting on today's date.

5. **Click OK.**

   The Project Options dialog box closes, and the task mode appears at the bottom of the Project window (Figure 3-13).

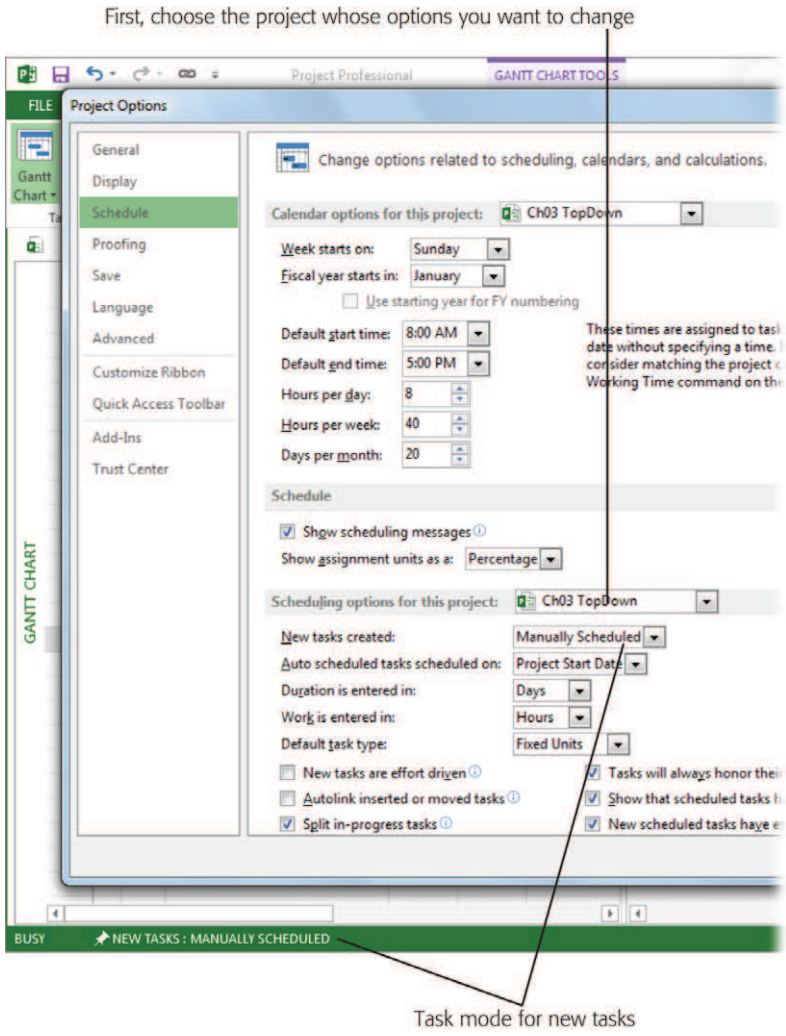

FIGURE 3-13

The "Scheduling options for this project" drop-down list contains all the files currently open in Project. Before you change any options below this drop-down list, choose the project whose options you want to change. If you want your future projects to use a specific task mode, then create a template (page 708) with Project options set the way you want.

SWITCHING THE TASK MODE AS YOU WORK

You don't have to open the Project Options dialog box every time you want to switch between Manually Scheduled and Auto Scheduled mode. You can change the mode as you work. In the status bar at the bottom of the Project window (see Figure 3-13), simply click New Tasks, and then choose either Auto Scheduled or Manually Scheduled. Project sets all new tasks to the mode you choose until you change the mode again.

CHANGING THE MODE OF AN EXISTING TASK

If you're in the early planning stages of a project, you may want tasks set to Manually Scheduled because you don't have all the info you need. As the project picture becomes clearer, many of those manually scheduled tasks will fall into place in your overall schedule, and you'll likely want them to be auto-scheduled. On the other hand, if you usually work with auto-scheduled tasks but have one task that occurs on a specific date, then you can switch it to Manually Scheduled mode. Happily, you can change a task's task mode anytime you want.

NOTE You can change tasks' task modes only in Project files saved in the Project 2010 file format or later. If you open a file from an earlier version in Compatibility Mode, you can click the Task Mode cell but you can't change its value. In addition, if you save a Project file containing manually scheduled tasks in an earlier file format, those tasks revert to being automatically scheduled.

The Entry, Schedule, and Summary tables automatically include the Task Mode column, so they're your ticket to switching modes. To change a task's task mode, follow these steps:

1. **In the View tab's Data section, click Tables, and then choose Entry, Schedule, or Summary to display the corresponding table.**

   To show the Task Mode column in another table, right-click the column heading to the right of where you want to insert the column, and then choose Insert Column. In the drop-down list, choose Task Mode.

2. **Click the task's Task Mode cell, click the down arrow that appears, and then choose Auto Scheduled or Manually Scheduled.**

   The Manually Scheduled icon looks like a pushpin. The Auto Scheduled icon looks like a task bar with an arrow pointing to the right. In addition, the task bar style in the timescale changes to indicate whether the task is manually or automatically scheduled, as described on page 61.