GETTING TO KNOW PROJECT 2013

Microsoft Project is software specifically designed to assist you in managing and controlling projects. It is arguably one of the more difficult software products to learn, not only because you need to study how to use the software, but because you also need to know a little about project management theory.

Nevertheless, you need to start somewhere. This is a roll up your sleeves session where you will be introduced to the basic operating philosophy of **Microsoft Project**.

In this session you will:

- ✓ gain an understanding of **Microsoft Project's** operating philosophy
- ✓ learn how to start **Microsoft Project 2013**
- ✓ gain an understanding of the **Project 2013 Start** screen
- ✓ gain an understanding of the main **Microsoft Project** screen elements
- ✓ gain an understanding of the operating process of **Microsoft Project**
- ✓ learn how to use the ribbon
- ✓ learn how to show and collapse the ribbon
- ✓ gain an understanding of **Backstage View** in **Microsoft Project**
- ✓ gain an understanding of the work area and project views
- ✓ learn how to change the view of your project
- ✓ learn how to split the project work area horizontally
- ✓ gain an understanding of sheet views in **Microsoft Project**
- ✓ learn how to change the table in a **Sheet** view
- ✓ gain an understanding of the special **Gantt Chart** view
- ✓ learn how to work with the **Gantt Chart** view
- ✓ gain an understanding of the **Quick Access Toolbar**
- ✓ learn how to add a command to the **Quick Access Toolbar**
- ✓ learn how to work with existing **Microsoft Project** files
- ✓ learn how to exit from **Microsoft Project**.

HOW PROJECT 2013 WORKS

Microsoft Project is really a computer database that uses two main *tables* of data to keep track of your project. *Project* uses one table to store information about the tasks of your project and the other for *resource* information. By using the many *views* available in *Project*, you can display your project data from these tables in many different ways.

Tasks

This table is comprised of over 240 columns (or fields) which contain all sorts of information about the tasks such as scheduled start, scheduled finish, name, duration, cost, and the like. Some of these fields require you to enter data, while others are calculated and filled by Microsoft Project for you.

ID	Name	Duration	Start	Finish	Fixed	Cost	etc...
8	Erect fencing	3 days	9/7/2015	11/7/2015	No	$500	

Resources

This table contains over 200 fields (or columns).

ID	Name	Initials	Group	Max Units	Standard Rate	Overtime Rate	etc...
3	Builder	FG	Contractor	4	$55.00/h	$75.00/h	

The two tables are joined together by assigning *resources* to *tasks*.

Views

To help you see, or view, your data, *Microsoft Project* adopts techniques used in spreadsheets, databases, and graphics packages.

For example you can see your task or resource table in sheets on the screen. Sheets are similar to spreadsheet programs where data is presented in rows and columns. In fact, many of the operations used in spreadsheets, such as widening columns, deleting data, selecting cells, and the like, are also found in *Microsoft Project*.

		Task	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1			◢ Planning	43 days	Mon 11/05/15	Wed 8/07/15		
2			Create architectural plans	3 wks	Mon 11/05/15	Fri 29/05/15		Architect,Draftsperson,Building Clerk[25%]
3			Submit plans for approval	1 mon	Mon 1/06/15	Fri 26/06/15	2	Architect,Building Permit[$2,500.00]
4			Order materials	8 days	Mon 29/06/15	Wed 8/07/15	3	Draftsperson,Building Clerk
5			Planning Completed	0 days	Wed 8/07/15	Wed 8/07/15	4,2,3	
6			◢ Site Works	27 days	Thu 9/07/15	Fri 14/08/15		
7			Erect fencing	3 days	Thu 9/07/15	Mon 13/07/15	5	No Barrier Fencing
8			Erect site buildings	4 days	Tue 14/07/15	Fri 17/07/15	7	Supervisor,Carpenter[400%],Labourer

You can also see, or view, your data in forms. These forms are similar to a form view that you receive for data entry screens in database programs. Forms allow you to add or edit data and you can usually cycle through the cards as you would in a normal database.

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
1	Architect	100%	112.5h	0h	112.5h	112.5h	0h
2	Draftsperson	100%	112.5h	0h	112.5h	112.5h	0h
3	Building Clerk	25%	28.13h	0h	28.13h	28.13h	0h

Name: Create architectural plans   Duration: 3 wks   ☐ Effort driven   ☐ Manually Scheduled
Start: Mon 11/05/15   Finish: Fri 29/05/15   Task type: Fixed Units   % Complete: 100%

If you wish to see your data graphically you can view it as a Gantt Chart or Network Diagram. In addition you have a variety of other graphs for displaying resources.

STARTING PROJECT IN WINDOWS 8

To create a new project or edit an existing one, the first thing you must do is start *Microsoft Project*. *Windows 8* provides a number of ways to start a program. If Project has been installed, there should be access to it on the *Windows Start* screen. Alternatively, you can *Search* for *Project* via the *All apps* screen or simply type '**project**' into the *Windows Start* screen.

Try This Yourself:

1 Right-click anywhere on the *Windows Start* screen to display the *App bar* at the bottom of the screen

2 Click on *All apps* in the *App bar* to display the *Apps* screen

From here you can view all your apps, including Project. But you may need to scroll to it first…

3 If necessary click on the scroll button at the bottom right of the screen until you can see the *Microsoft Project 2013* apps, then click on *Project 2013* to open the program with the *Project Start* screen displayed

There is an even faster way to open Project…

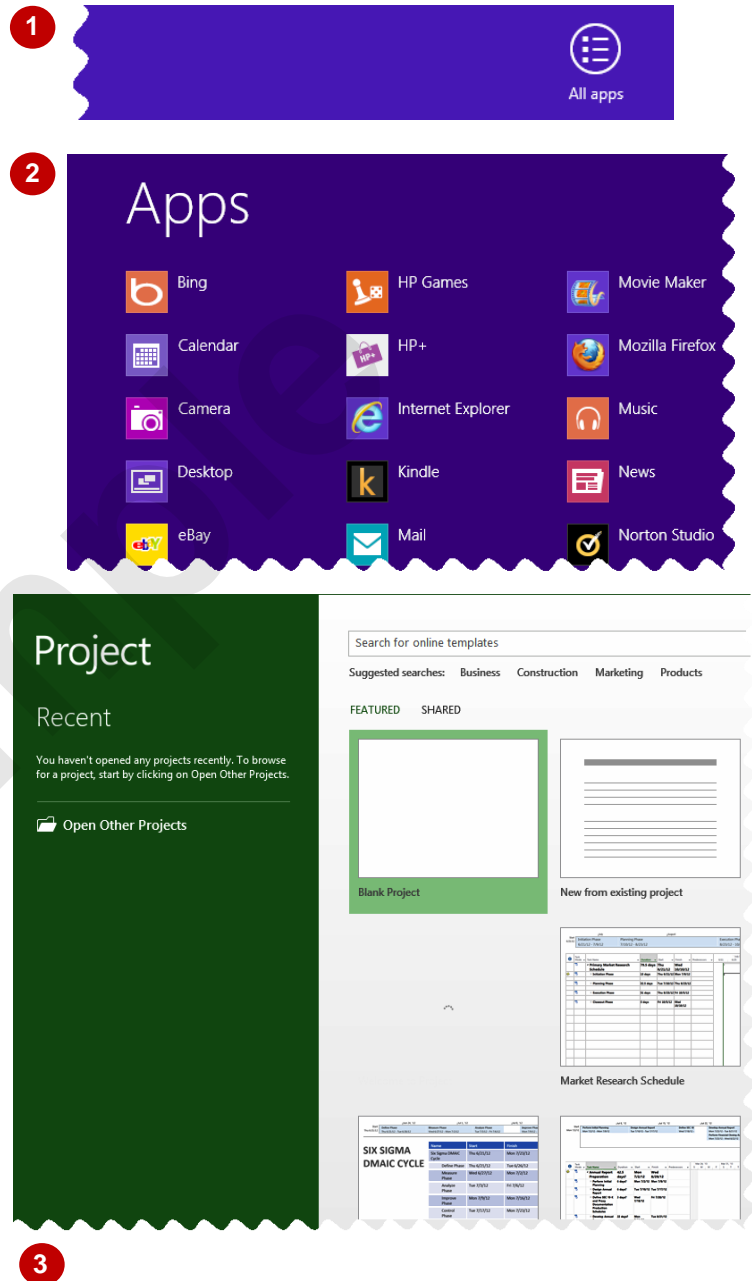**4** Press the *Windows* key to return to the *Windows Start* screen

5 Begin typing **project** anywhere into the *Start* screen

A Search pane will appear on the right side of the screen and Project 2013 will display under Results in the middle of the screen…

6 Click on *Project 2013* to open the program with the *Project Start* screen displayed

7 Click on *Blank Project* to display a new project

1

2

Apps

Bing	HP Games	Movie Maker
Calendar	HP+	Mozilla Firefox
Camera	Internet Explorer	Music
Desktop	Kindle	News
eBay	Mail	Norton Studio

3

Project

Recent

You haven't opened any projects recently. To browse for a project, start by clicking on Open Other Projects.

Open Other Projects

Search for online templates

Suggested searches: Business Construction Marketing Products

FEATURED SHARED

Blank Project

New from existing project

Market Research Schedule

For Your Reference…

To *start Project* in *Windows 8*:

- Display the *All apps* screen and click on *Project 2013*, or
- Type **project** into the *Start* screen and click on *Project 2013* under *Results*

Handy to Know…

- You can add a *Project* tile to the *Start* screen by right-clicking on *Project 2013* on the *Apps* screen and clicking on *Pin to Start*. You can add a *Project* icon to the taskbar by right-clicking on *Project 2013* on the *Apps* screen and clicking on *Pin to taskbar*.

UNDERSTANDING THE PROJECT START SCREEN

Unless you start Project with a specific data file *Project 2013* will open with a *start* screen on display. This is like a gateway into Project and from this initial screen you can choose what kind of workbook you want to work with. You can choose to work with a recent file, open an existing file, or even create a new file using the available templates.

The Project 2013 Start Screen

In Microsoft Project your data is stored in a computer file referred to as a *workbook*.

The Project 2013 *start* screen is very helpful if you want to quickly access files you have worked on recently or create a new project file based on one of the available templates (including the default *Blank* project template). It's like a gateway into the program.

If you have already worked on projects, a list of recent files will display below *Recent* in the green pane to the left of the screen. If you haven't worked on any projects yet you can still open existing files by clicking on the link *Open Other Projects* located below *Recent.* This lets you open an existing project file from your computer or SkyDrive.

The main pane of the *start* screen displays available templates you can use to create a new project and a search box you can use to search the internet for additional templates. Templates are simply layouts that have already been created which you can customise to suit your needs and then enter relevant data. If you want to start with a clean slate you can choose the *Blank project* template – you'll probably find this is the one you'll use most of all.

In the top right corner of the *start* screen you'll see information about the account you've used to sign into *Windows* as well as *help* ? , *minimise* — , *restore down* ☐ and *close* ✕ tools.
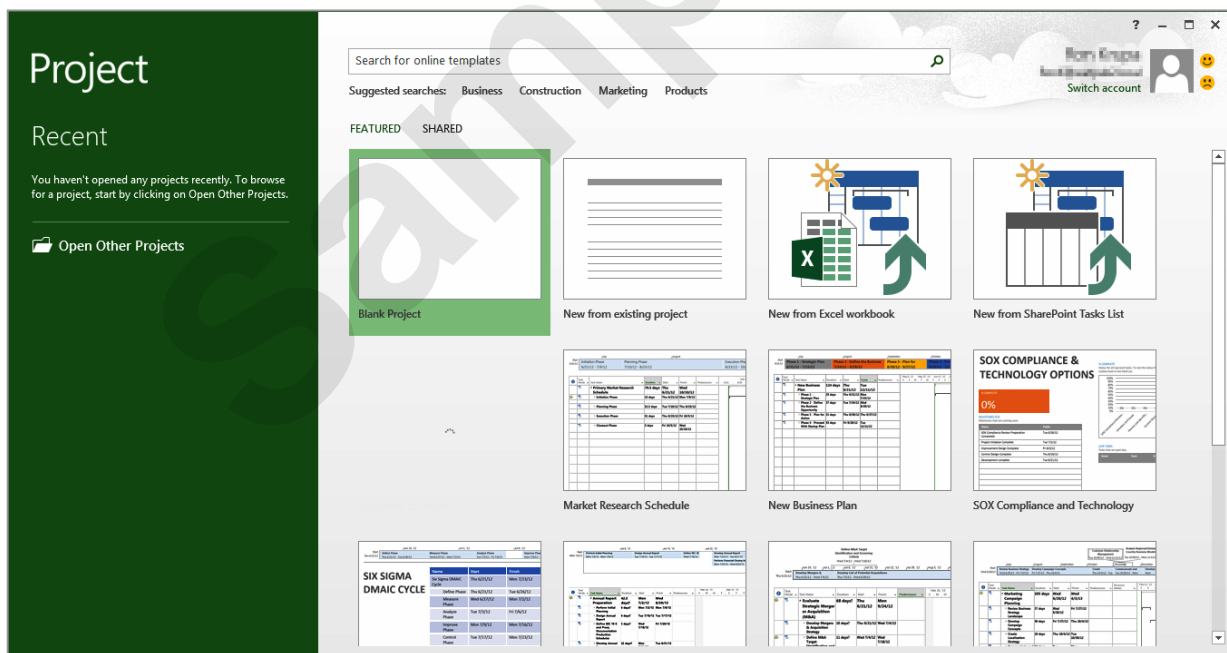

The *start* screen will only display when you launch the *Project 2013* application directly – that is, by clicking on a *Project tile* on the *Windows 8 Start* screen, clicking on the application on the *Apps* screen or under search results, or clicking on the taskbar icon if the application has been pinned to the desktop *Taskbar*.

Project 2013 can also be started in *Windows 8* by double-clicking on a project file in the *File Explorer*. When this occurs *Project 2013* will start with the project screen and the *start* screen shown above will be bypassed.

THE PROJECT 2013 SCREEN

The Microsoft Project screen will vary depending upon the **view**, **table** and **filter** that is currently active. However, you will need to become familiar with the basic components of the screen**Error!** **Bookmark not defined.** as shown below. Understanding the layout of the screen, and its components and terminology will help you in using Microsoft Project.
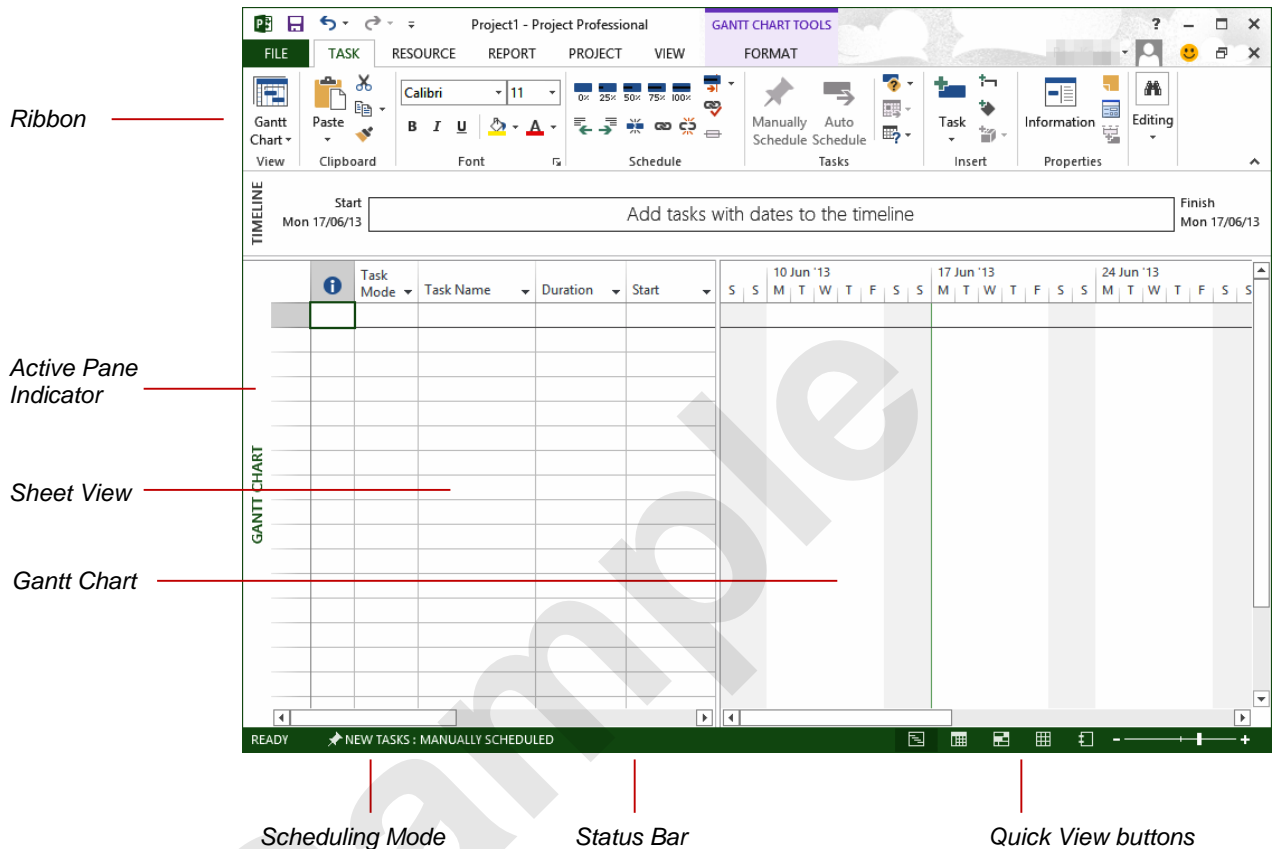
| Ribbon	The *ribbon* displays the commands required to use Microsoft Project. It is made up of tabs (*File*, *Task*, *Resource*, etc) which each contain *groups* of commands organised into logical order.
Active pane indicator	The *active pane indicator* is a vertical bar with a dark colouring that runs down the left side of a screen (or a **view**). The one above contains the words **Gantt Chart** so that you know you have a **Gantt Chart** as the *active* view. You can actually have two different views open by *splitting* the screen – only one view, however, can be active because things like the commands on the **Ribbon** are controlled by what you are viewing. The indicator shows which view is currently *active*.
Sheet view	Your project's tasks and resources can be seen as a *table*, much like a spreadsheet. In Microsoft Project this is referred to as a **sheet view**.
Scheduling mode	Your project can be scheduled manually (the default) or automatically. This (very important) indicator tells you which mode is currently applicable.
Status bar	Watch this space – it tells you what Microsoft Project is currently up to.
Quick view buttons	There are many ways to change the view of the screen. These four buttons provide quick access to the four most common views saving you the hassle of locating the commands to do this on the ribbon.
Gantt chart	The **Gantt Chart** is the world's most favourite view of a project. It shows your project's tasks as a series of timelines. It is the default view of Microsoft Project when it is first started and, in reality, will most likely be the one you use most.

PROJECT OPERATIONS

For a novice user the **Project 2013** screen can seem intimidating. However, you'll soon see that it is made up of only three key areas. The data you type is placed in the **work area**. The data here can be manipulated and changed using commands on the **ribbon**. The data is saved in a project file which is controlled through commands on the **Backstage**.
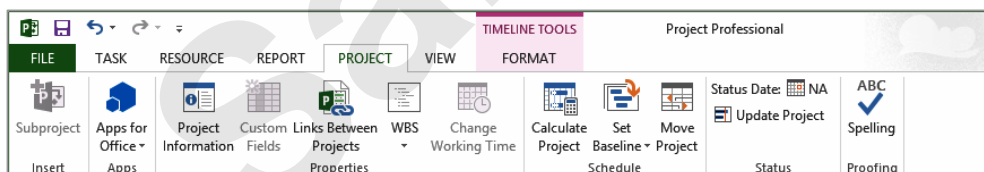
The Work Area

The **work area** occupies the largest part of the screen and contains the data associated with your project. The key point to remember is that a project is made up of *tasks* and *resources* and the work area allows you to view your task and resource data in a number of different ways. The work area may show your data in a **sheet** view, or maybe a **chart** view like a Gantt chart or maybe even both!
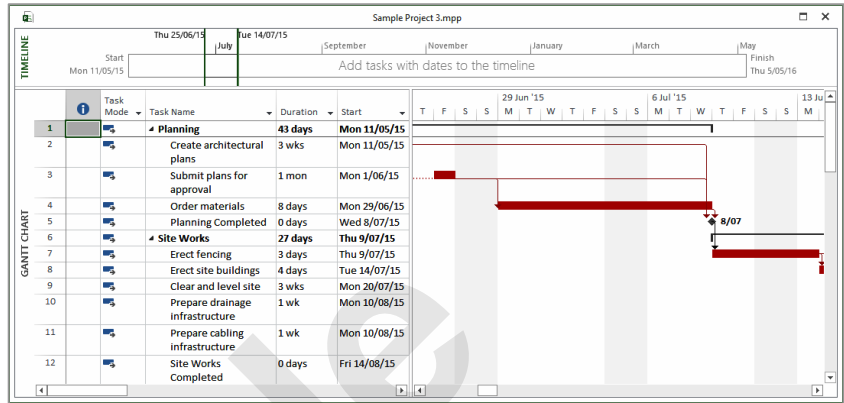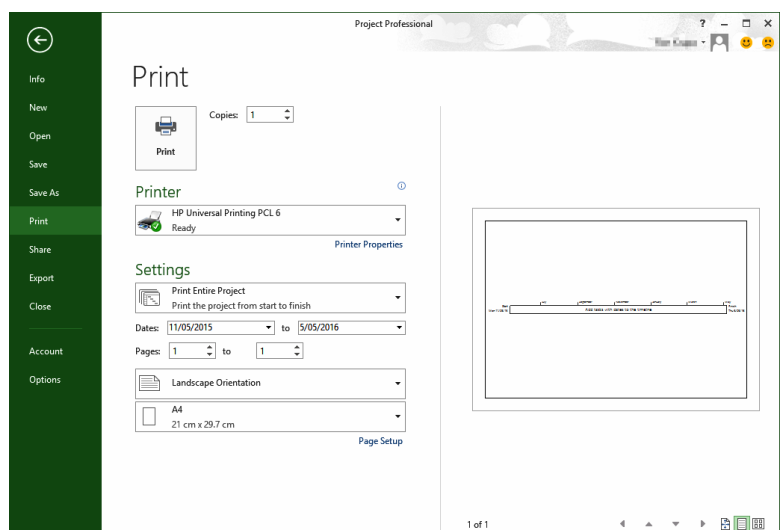

The Ribbon

When you need to do something with the data in the work area, such as format it, colour it, analyse it, move it, copy it, change the view of it and much more, you'll find all of the relevant commands on the **ribbon**. The **ribbon** has commands organised thematically using a series of **tabs** across the top. Commands on each tab are further organised into **groups** of like-commands. It's not too hard to get the hang of where a command can be found. Remember, a project is simply a view of task and resource data – hey, have a look at the **ribbon** and you'll find a *TASK* and a *RESOURCE* tab! So whatever you need to do with tasks can be found on the **TASKS** tab, and anything you want to do with resources can be found on the **RESOURCE** tab.

Backstage

When you want to do something with the data in your work area, such as save it so that you can access it again later, print it, share it with a colleague, send it to your boss, protect it from prying eyes, or whatever, you will need to access the **Microsoft Office Backstage** area of Microsoft Project. The **Backstage** is accessed using the **FILE** tab on the *Ribbon*. Rather than offering you commands on a *Ribbon*, **Backstage** occupies the entire screen and has a series of options down the left side. Here the **Print** option is active, and that is why you can see a preview of the work area and a series of print-related options on the right side of the **Backstage**.


USING THE RIBBON

The **ribbon** is the command centre for Microsoft Project. It provides a series of **commands** organised into **groups** and placed on relevant **tabs**. Tabs are activated by clicking on their name to display the command groups. **Commands** are activated by clicking on a button, tool or gallery option. Everything you could possibly want to do in Project will be found somewhere on this **ribbon**.

Try This Yourself:

*Before starting this exercise ensure that Project has started...*

1 Examine the various groups on the **TASK** tab

The group names appear at the bottom of the ribbon…

2 Click on the **RESOURCE** tab

The commands on this tab are used to work with resources. Many will not be available because there are no resources in the blank project on the screen. You can never be too sure what you'll get when you click on a command…

3 Click on **Resource Pool** in the **Assignments** group to display a *menu*

4 Click on **Share Resources** to display the **Share Resources** *dialog box*

5 Click on **[Cancel]** to pop the box away

6 Click on the other tabs and spend some time examining the groups and commands they contain
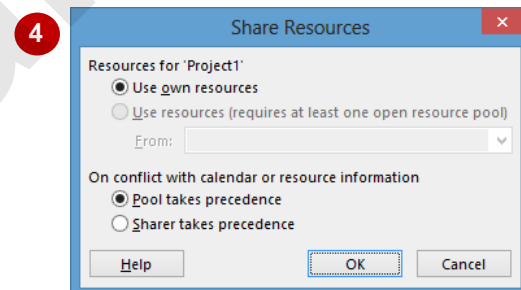
7 Click on the **TASK** tab
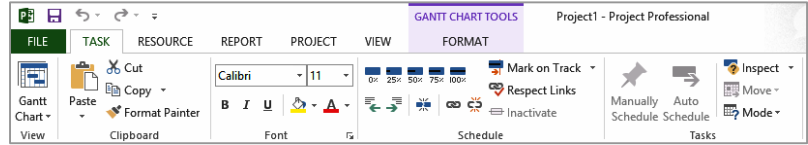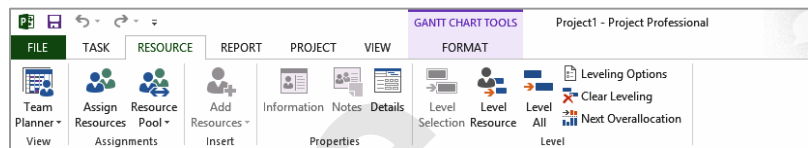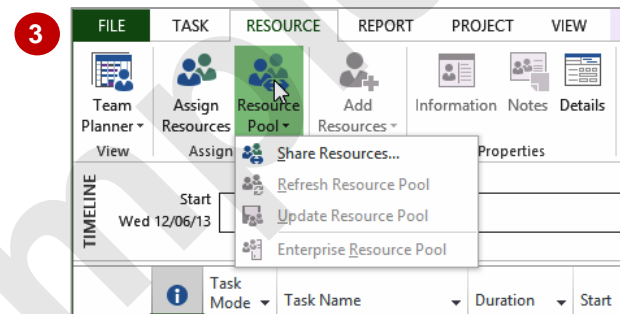
For Your Reference…

To **use** the **ribbon**:

1. Click on a **tab** to display the commands
2. Click on a **button** to activate a *command*, display a *gallery* or display a *dialog box*

Handy to Know…

* **Contextual tabs** appear in the ribbon in specific circumstances. For example, if you insert a picture, the **PICTURE TOOLS: FORMAT** tab will appear. This provides quick access to all of the tools you may need to modify and work with the picture.

SHOWING AND COLLAPSING THE RIBBON

The *ribbon*, valuable as it is, does tend to occupy a reasonable amount of space. You can minimise the *ribbon* so that only the tabs are visible. You can minimise the *ribbon* as a

once-off operation, or have it remain constantly minimised and display full commands only briefly when a tab is clicked.

Try This Yourself:

Before starting this exercise ensure that Project has started...

1 Click on the **PROJECT** tab to display the *Project* commands

**2** Double-click on the **PROJECT** tab to minimise the ribbon

While the tabs stay visible, the rest of the commands are hidden...

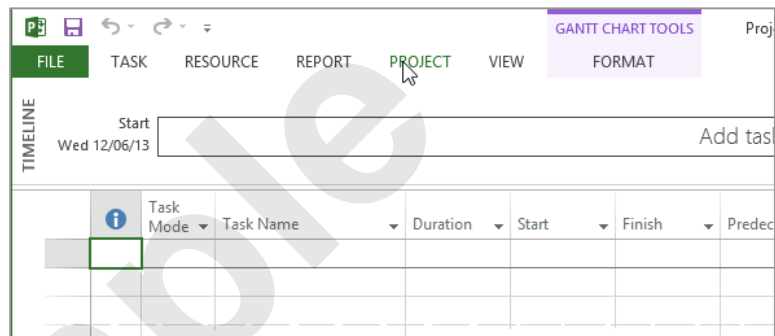**3** Click on the **VIEW** tab to display the ribbon and see the commands for the **VIEW** tab

4 Click back in the work area of the project

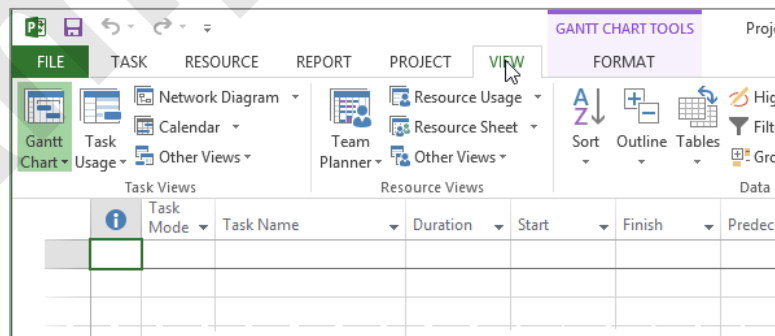*The ribbon will hide again – it only becomes visible when you need it…*

5 Double-click on the **TASK** tab to redisplay the ribbon permanently again
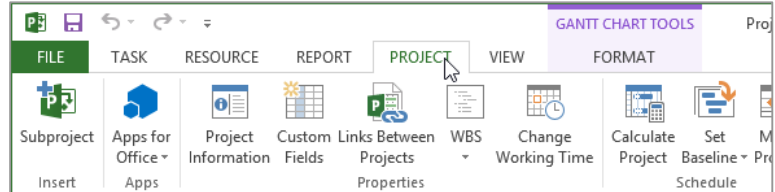
For Your Reference…

To *hide/display* the *ribbon*:

1. Double-click on the active tab to hide the ribbon
2. Click on a tab to see the ribbon temporarily
3. Double-click on a tab to show the ribbon permanently

Handy to Know…

- You can use the keyboard shortcut `Ctrl` + `F1` to show or hide the ribbon.

UNDERSTANDING THE BACKSTAGE

The *ribbon* lets you work *on the content* in a document so that you can add more content, format it, insert pictures into it, copy it, and much more. The *Backstage view*, which is accessed using the *FILE* tab, lets you *do something with* the content you create. You can save it for later use, print it on paper, send it via email, and more by using the options found in *Backstage view*.
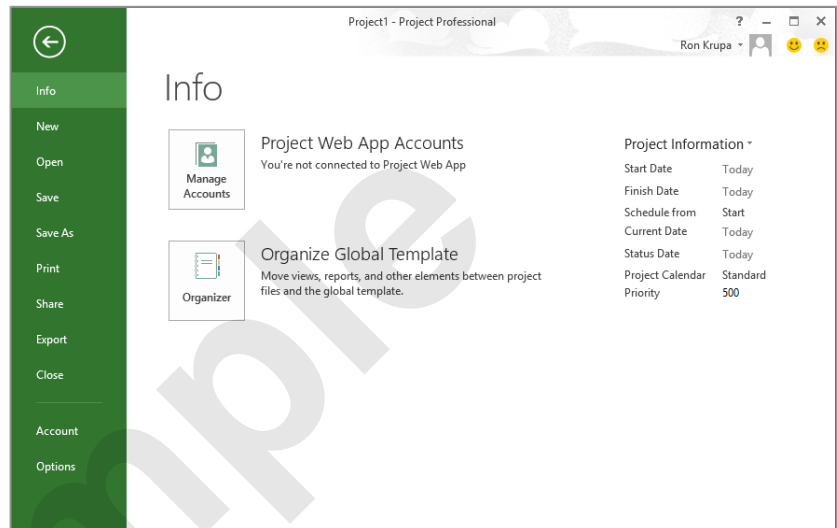
The Backstage View

The *FILE* tab on the ribbon is not a normal tab – as you can tell by the fact that it is coloured. Clicking on the *FILE* tab launches a mini-program within Microsoft Project known as *Backstage view*. *Backstage*, as it's known for short, occupies the entire screen.

At the left of the *Backstage* is a navigation pane which is made up of *tabs*. These tabs provide you with access to various operations, such as printing, saving and sharing. They can also provide you with information about your project such as the file size.

Clicking on one of these tabs brings up a range of options associated with the particular operation.

The whole underlying purpose of *Backstage* is to let you protect your data, share it with others, and provide you with valuable information about your project. Depending on what type of

Backstage Tabs

The *Backstage tabs* provide more options for working with a project

|	
Info	Provides status information about the current project and lets you manage versions and permissions.
New	Lets you create a new project and provides access to a gallery of inbuilt templates and ready access to a range of online templates.
Open	Provides a list of recent projects as well as the option to search through your Computer, SkyDrive or other place, to find what you are looking for.
Save	Saves your current project (if already saved to a location) or prompts you to save to a location.
Save As	Allows you to name your project and save it to a location.
Print	Lets you print the current project and preview it.
Share	Lets you share your project with other people via email, online presentation, blog or Cloud (SkyDrive).
Export	Allows you to create a PDF/XPS document or change the file type of your project.
Close	Closes your current project.
Account	Contains product and user information.
Options	Presents you with a range of options which assist in the creation and editing of your project.

THE PROJECT WORK AREA

The main part of the Microsoft Project screen is made up of the *work area* where your project data is displayed. Remember, Project is really just two tables of data – *tasks* and *resources*.

The work area shows you different aspects and sometimes combined *views* of this data. For example you can view your tasks and the resources assigned to them.

The View Tab

The *VIEW* tab on the ribbon provides you with access to the views for your project's data.

Notice, there is a *Task Views* grouping and a *Resource Views* grouping here!
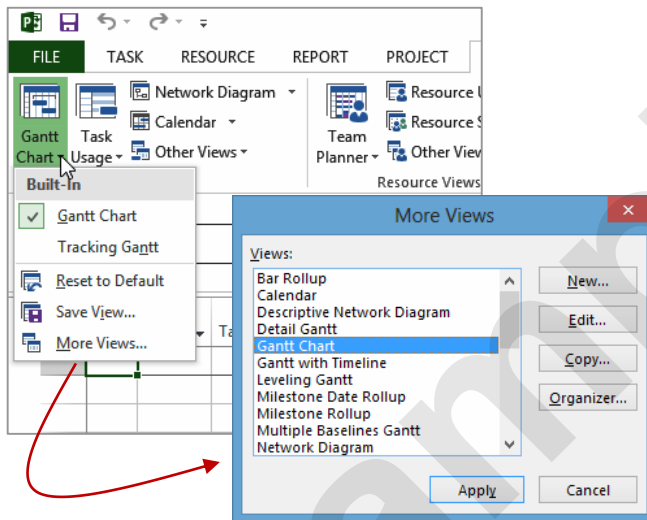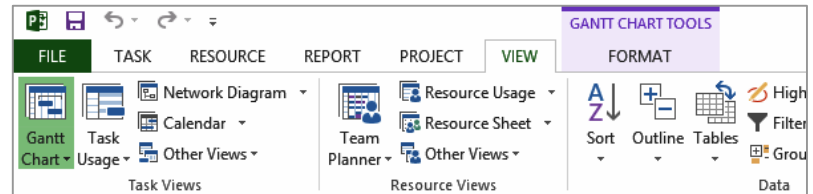
When you click on the arrow for one of the *VIEW* commands you'll receive a menu of further views available to you. All of the menus feature the *More Views* command which displays the *More Views* dialog box which lists all of the standard views available to you in Microsoft Project.

Built-In Project Views

Microsoft Project contains 27 different built-in views for you. Seven of these views are available from the *Task Views* and *Resource Views* groupings on the *VIEW* tab, while the full 27 are available from the More Views dialog box. Here's a list of the 27 views – the ones marked with a (*T*) or (*R*) are accessible directly from the *VIEW* tab of the ribbon.

|		
Bar Rollup	Multiple Baselines Gantt	Task Details Form
Calendar (*T*)	Network Diagram (*T*)	Task Entry
Descriptive Network Diagram	Relationship Diagram	Task Form
Detail Gantt	Resource Allocation	Task Name Form
Gantt Chart (*T*)	Resource Form	Task Sheet
Gantt with Timeline	Resource Graph	Task Usage (*T*)
Levelling Gantt	Resource Name Form	Team Planner (*R*)
Milestone Date Rollup	Resource Sheet (*R*)	Timeline
Milestone Rollup	Resource Usage (*R*)	Tracking Gantt

WORKING WITH VIEWS

A *view* is the way we look at the project and the data it contains. In order to work with your project successfully, you will need to learn how to operate and manipulate the many different views.

The main way to change the view of your project is through the commands on the *VIEW* tab or through the *Quick Views* buttons at the bottom right of the screen.

Try This Yourself:

Before starting this exercise ensure that Microsoft Project has started...

1 Click on the *VIEW* tab and spend a few moments studying the options in the *Task Views* and *Resource Views* groupings

2 Click on *Task Usage* in the *Task Views* group to see the work allocations on the screen

3 Click on *Calendar* in the *Task Views* group to see the screen laid out as a calendar

4 Click on *Other Views* in the *Task Views* group to display a menu and click on *Task Form*

5 Click on *Resource Sheet* in the *Resource Views* group to see a spreadsheet-like view of the resources

6 Click on *Gantt Chart* in the *Task Views* group to return to the *Gantt Chart* view

1
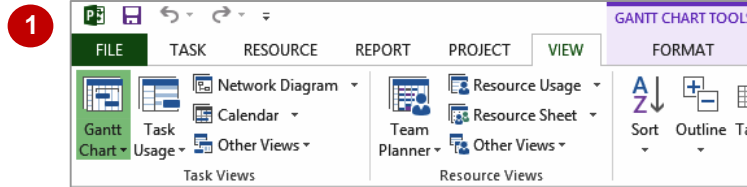
The commands on the ribbon grow or shrink in width depending on the size of the Project window – when they've shrunk down their names often don't appear. You may need to enlarge the window (if possible) to see the names properly.
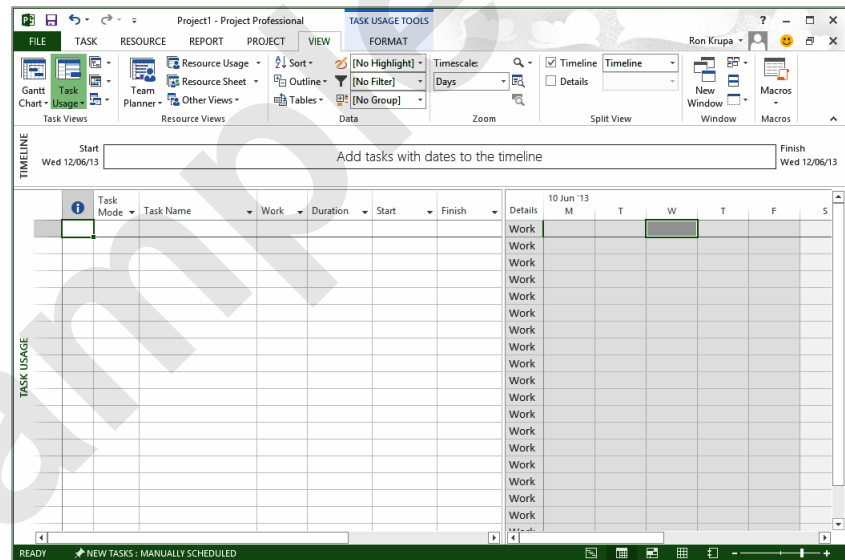
2 *There is an obvious lack of data presented on this screen! Don't worry too much at this stage about what the view is all about. All we are doing at the moment is examining the VIEW commands to see how they work and what they offer.*

For Your Reference…

To display different *views*:

1. Click on a command on the *VIEW* tab, or

   Click on the arrow of a command and click on *More Views* to display a list of all available views

Handy to Know…

- The *Gantt Chart*, *Task Usage*, *Team Planner* and *Resource Sheet* views appear as buttons at the bottom right of the screen.

WORKING WITH SPLIT SCREENS

Sometimes in Microsoft Project one view of your data is not enough! Project, therefore, allows you to *split* your screen horizontally into two views. For example, you might want to see tasks at the top and the resources they use at the bottom. One of these views is deemed to be the *active* view – as indicated by the *green* colouring of its name at the left of the screen.

Try This Yourself:

Before starting this exercise ensure that Microsoft Project has started...

1 Click on the *VIEW* tab and click on *Details* in the *Split View* group to see the *Task Form* in the bottom half of the screen

2 Click on the drop arrow (next to *Details*) to see the different views you can have

3 Click on *Resource Form* to see it in the lower area

4 Click on *Details* in the *Split View* group to return to the *Gantt Chart* view

5 Move the mouse pointer to the *split screen* button at the bottom right of the screen

6 Hold down the left mouse button and drag the button up about one third of the screen to create a custom split

7 Double-click on the button (which now runs the full width of the screen) to return to a single view
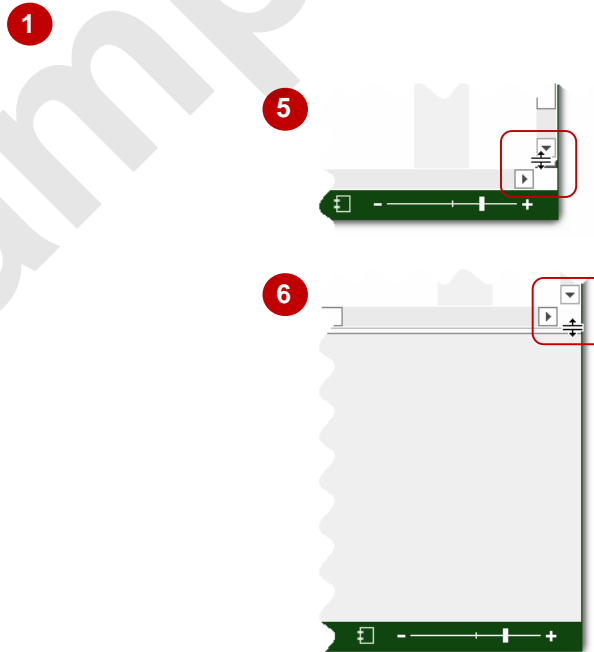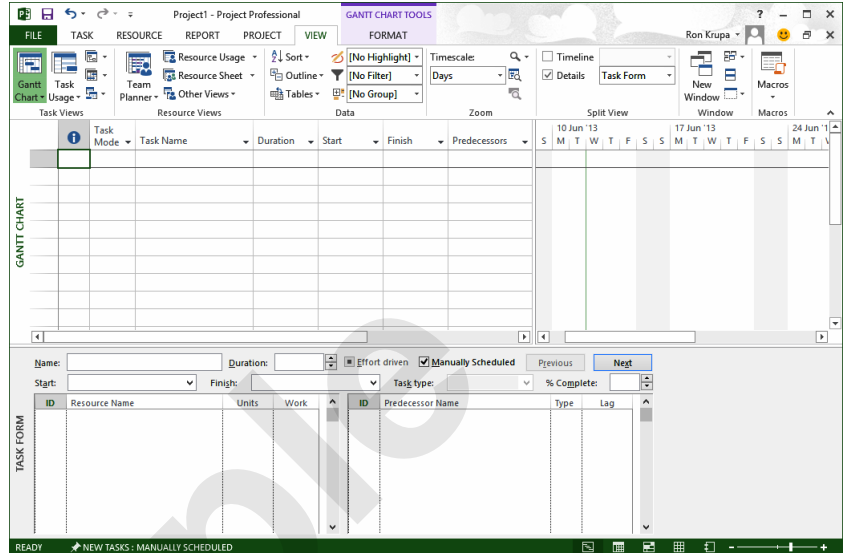
For Your Reference…

To display a *split view*:

1. Click on *Details* in the *Split View* group on the *VIEW* tab
2. Optionally, click on the drop arrow for *Details* and choose the desired view

Handy to Know…

- The *Timeline* tick box in the *Split View* displays/hides a timeline that appears above a *Gantt Chart*. The timeline embraces the start to the end of the project and provides a useful way of quickly moving through the duration of a project.