

Microsoft Project 2013: Part 1

Unit 01 – Starting a Project

WORKBOOK

Unit 01: Starting a Project


- Project Management 101
- Navigate and Customize the Project 2013 Interface
- Add Tasks to a Project
- Add Resources to a Project
- Save a Project

Project
Operations

OV 1 - 1

Slide 2


Topic A: Project Management 101



OV 1 - 2

Project

- **Project**
 - A temporary initiative to create a unique result.



Lectical
Operations

OV 1 - 3

Project Management

Project Management

The administration and supervision of projects using a well-defined set of knowledge, skills, tools, and techniques.

Project Management

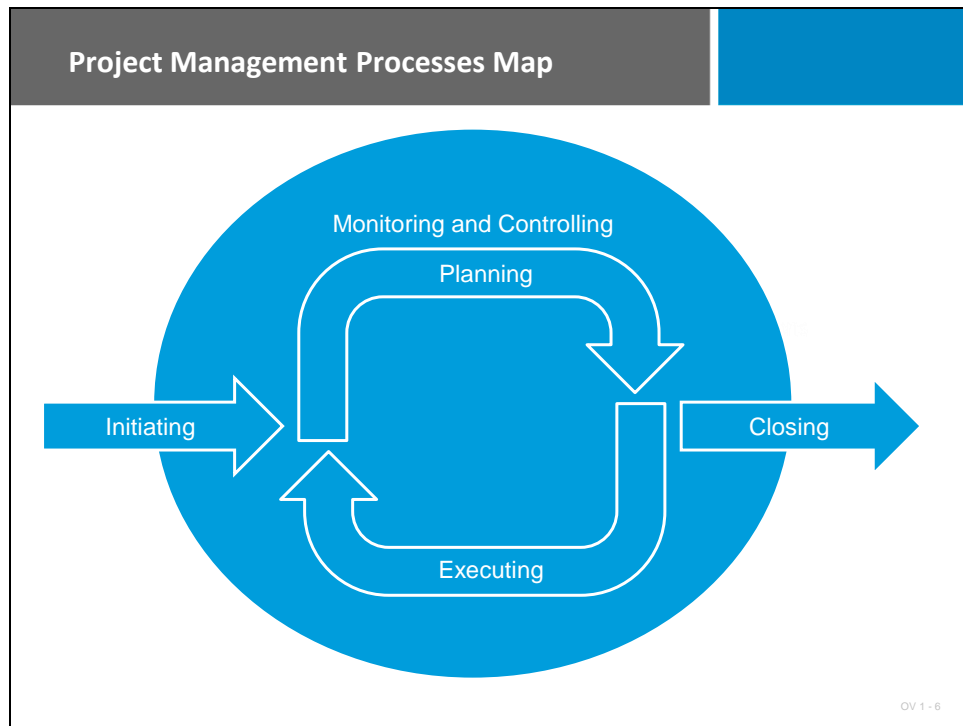
Operations

OV 1 - 4

Project Management Processes

Processes	Activities
Initiating	The project's goal is defined and the project is authorized. The output of this process is often a project charter.
Planning	The project's scope, time, cost, and other details are determined. The output of this process is a project plan.
Executing	Tasks are performed and resources are utilized to accomplish the project plan.
Monitoring and Controlling	The project's progress is tracked and corrective action is taken when necessary to keep the project on track.
Closing	The project's product, services, or end result is accepted by those who authorized it and the project is brought to an orderly conclusion.

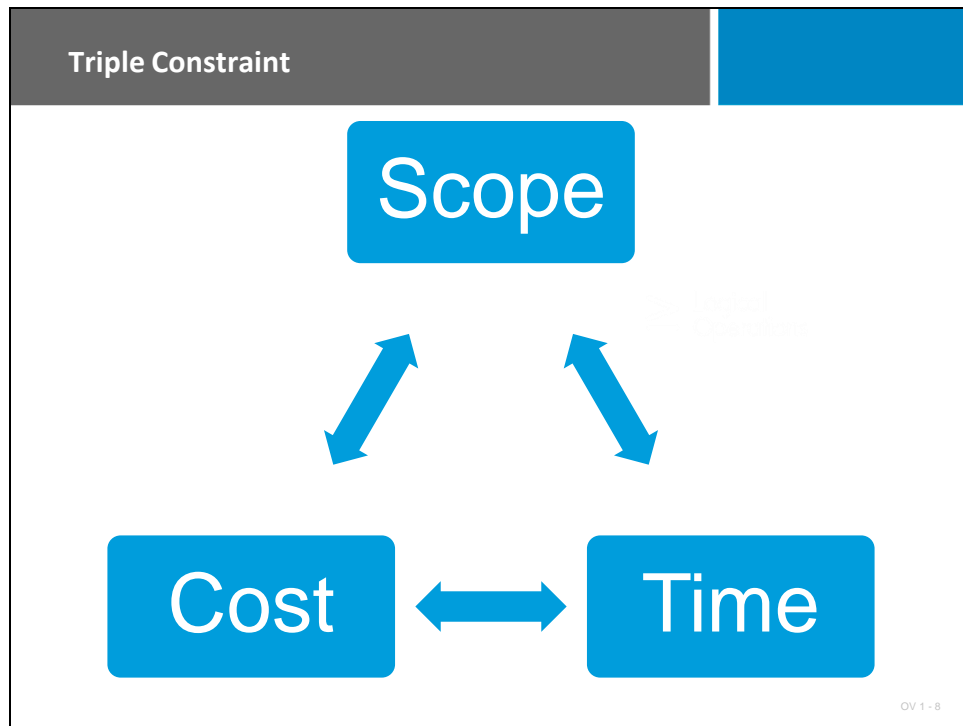
OV 1 - 5




Project Management Knowledge Areas

Area	Function
Integration	Unifying and coordinating the many different facets of the project.
Scope	Determining what work is needed to complete the project successfully and ensuring that work (and only that work) is performed.
Time	Estimating how long the work will take, planning when the work will be performed, and making sure the work is done according to schedule.
Cost	Estimating how much it will cost to perform the work and ensuring that the work is done within budget.
Quality	Ensuring that the work is done in a way that it meets agreed-upon specifications.
Human Resources	Assigning and managing the people who will do the work.
Communications	Making sure that the right project information is shared with the right people at the right time.
Risk	Predicting and mitigating project problems and opportunities.
Procurement	Finding and buying outside resources needed to perform the work.

OV 1 - 7



Sponsors and Stakeholders



Project Management

Project Operations

Project Stakeholders

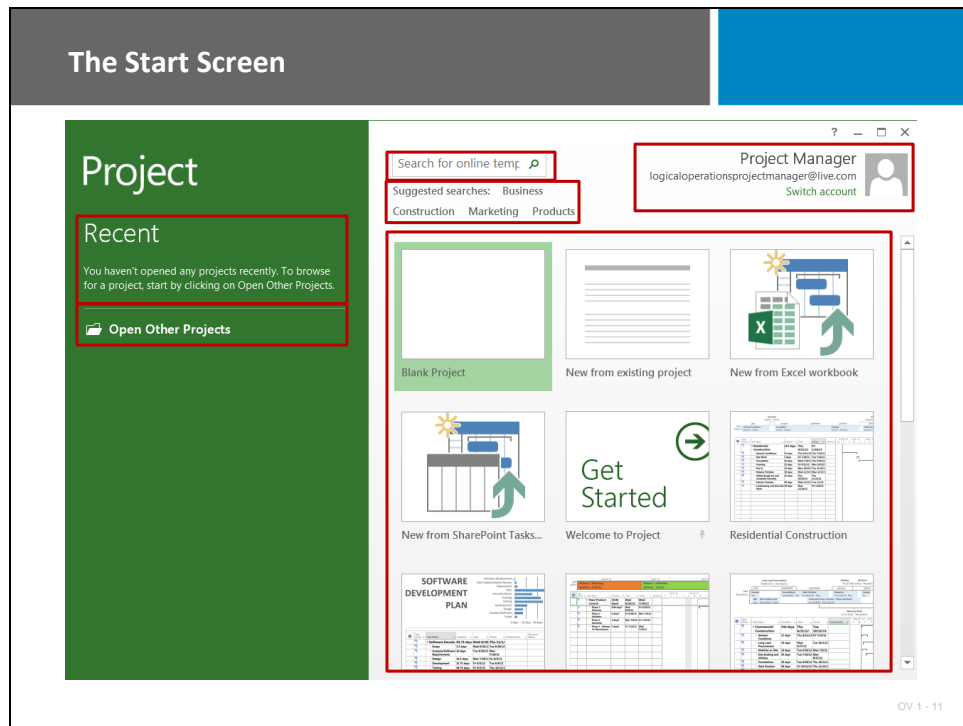
- **Sponsor**
 - The person in an organization who authorizes, supports, and approves a project.
- **Stakeholder**
 - Anyone who is actively involved in a project or has an interest in its outcome.

OV 1 - 9


Topic B: Navigate and Customize the Project 2013 Interface

[illegible]


Slide 11




Methods for Creating New Projects




Blank Project



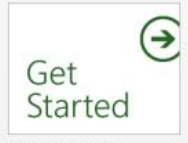
New from existing project




New from Excel workbook



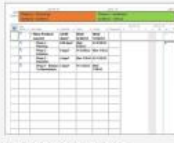
New from SharePoint Tasks...




Welcome to Project



Software Development P...



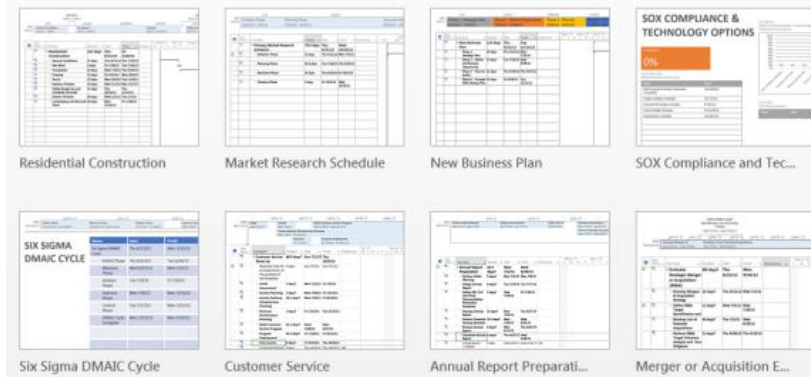
New Product Launch



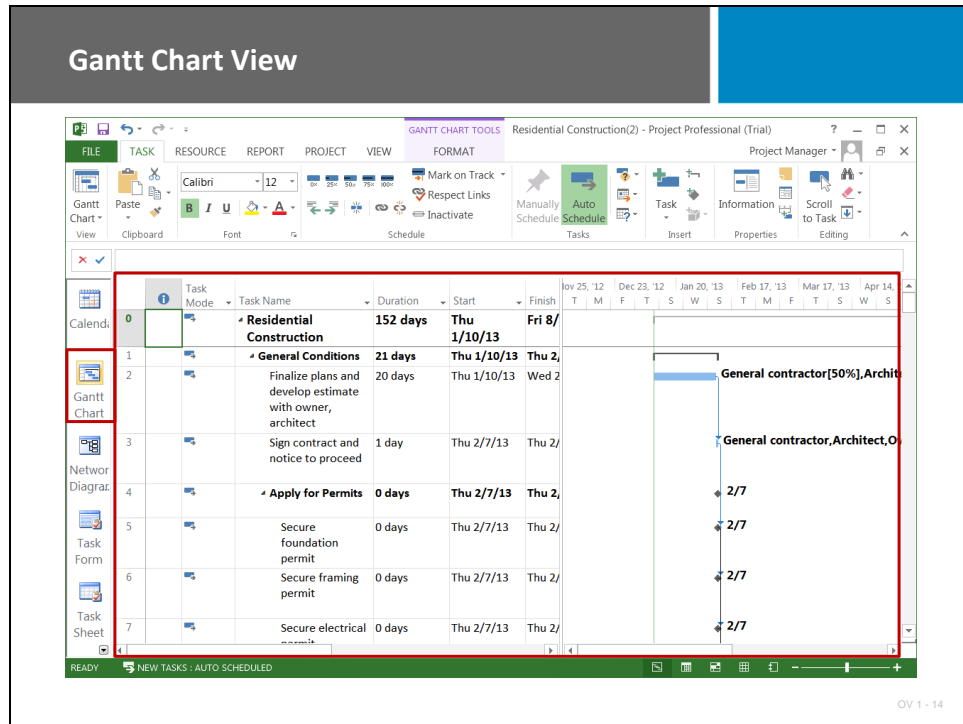
Commercial Construction

OV 1 - 12


Project Templates




Slide 14




The View Bar




Calendar




Gantt Chart




Network Diagram

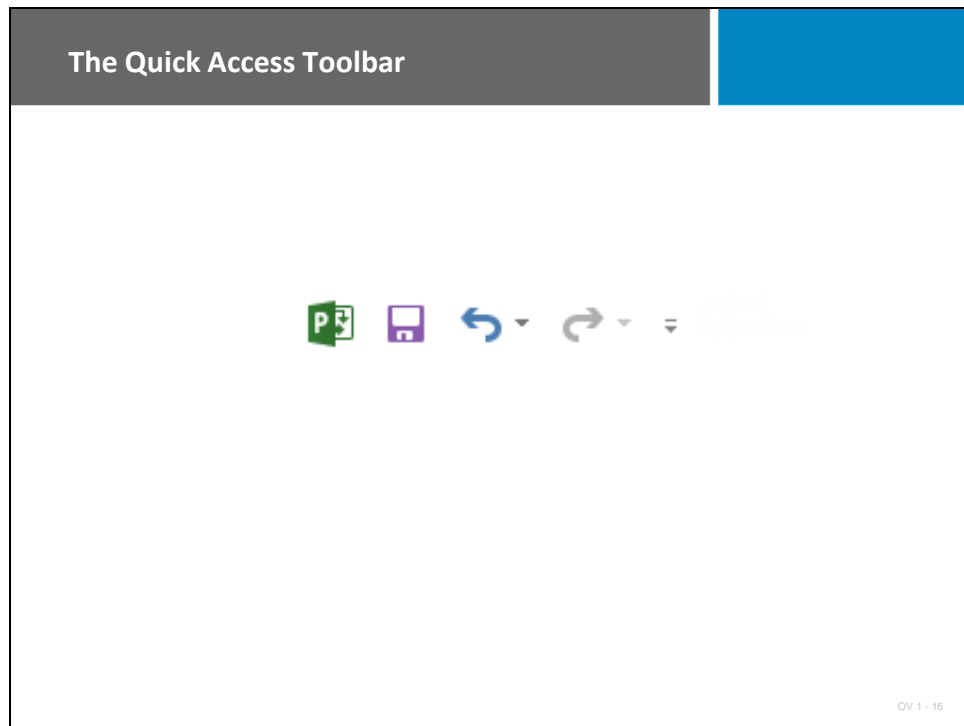


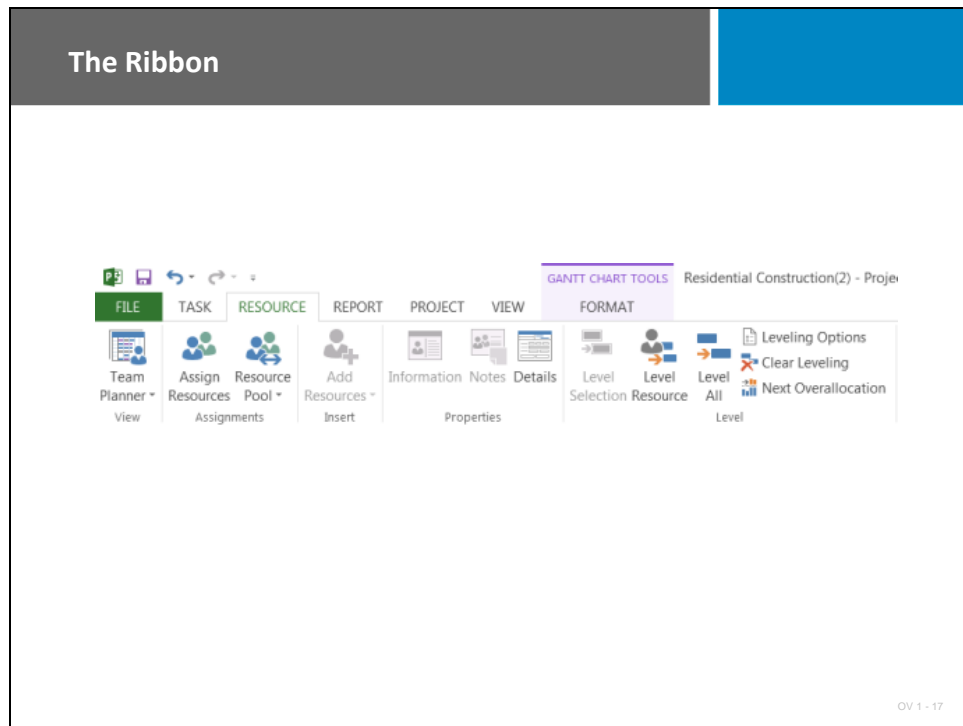
Task Form





OV 1 - 15





The Backstage View

←

Info

New

Open

Save

Save As

Print

Share

Export

Close

Account

Options

Info

Manage Accounts

Project Web App Accounts

You're not connected to Project Web App

Organizer

Organize Global Template

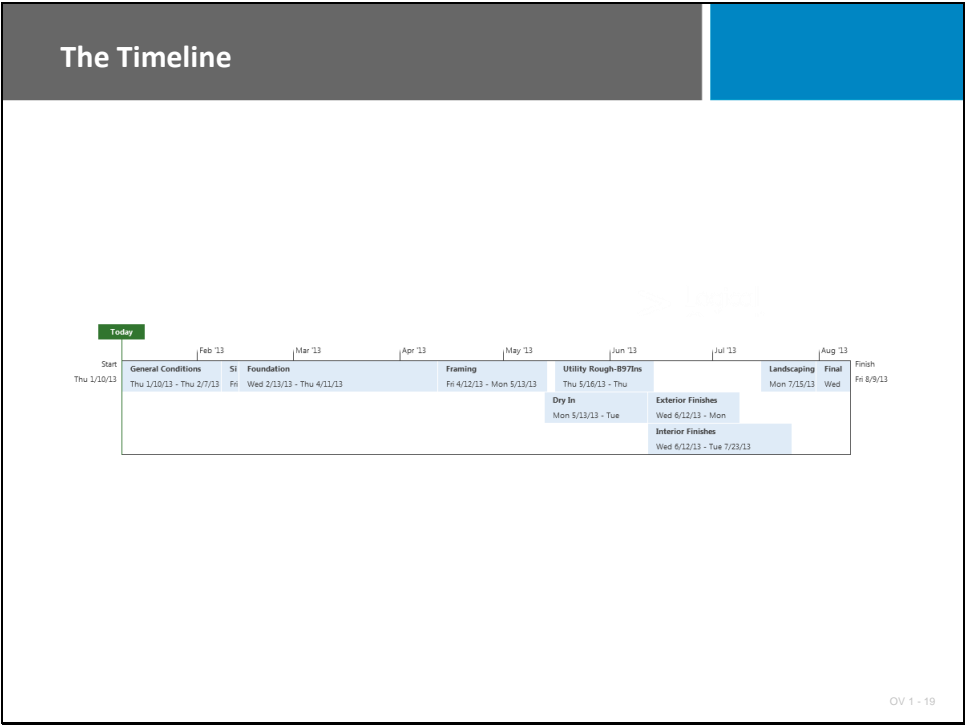
Move views, reports, and other elements between project files and the global template.

Residential Construction(2) - Project Professional (Trial)

Project Information

Start Date	Today
Finish Date	7/12/2013
Schedule from	Start
Current Date	Today
Status Date	Today
Project Calendar	Standard
Priority	500


OV 1 - 18



The Status Bar

[illegible]

Topic C: Add Tasks to a Project



Oracle
Project Operations

OV 1 - 21

Project Tasks

Project

TaskTaskTaskTaskTask

- **Task**
 - A specific chunk of project work.

OV 1 - 22

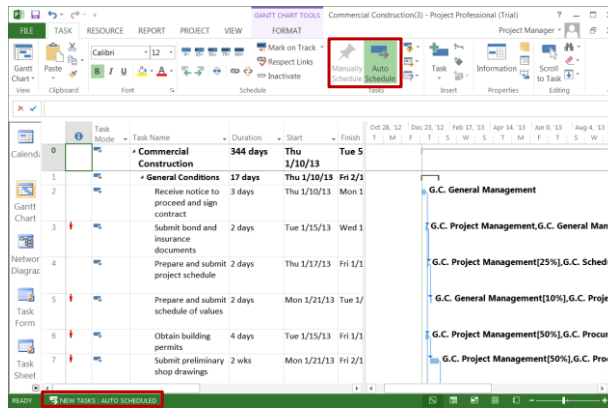
Manually Scheduled vs. Auto Scheduled Tasks

Manually scheduled

- You control the task's start date, end date, and duration.
- Default in Microsoft Project 2013.
- Fine for new and simple projects.

Auto scheduled

- Microsoft Project 2013 controls the task's start date, end date, and duration.
- Best for more mature and complex projects.



Task Information Dialog Box

The screenshot shows the 'Task Information' dialog box with the following fields and options:

- General Tab:**
 - Name:
 - Duration: ☐ Estimated
 - Percent complete:
 - Priority:
 - Schedule Mode: ☒ Manually Scheduled ☐ Inactive
 - Auto Scheduled: ☒
 - Dates: Start: Finish:
 - ☐ Display on Timeline
 - ☐ Hide Bar
 - ☐ Rollup
- Buttons:** Help, OK, Cancel

Task Durations

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

Name: Place concrete for foundations & basement walls

Duration: 12d ☒ Estimated

Percent complete: 0%

Schedule Mode: ☐ Manually Scheduled ☒ Auto Scheduled

Priority: 500 ☐ Inactive

Dates

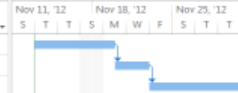
Start: Thu 2/7/13 Finish: Fri 2/22/13

☐ Display on Timeline
☐ Hide Bar
☐ Rollup

Help OK Cancel


Task Links

	Task Mode	Task Name	Duration	Start	Finish	Predecessors
1		Predessor Task	5 days	Tue 11/13/12	Mon 11/19/12	
2		Task	3 days	Tue 11/20/12	Thu 11/22/12	1
3		Successor Task	6 days	Fri 11/23/12	Fri 11/30/12	2



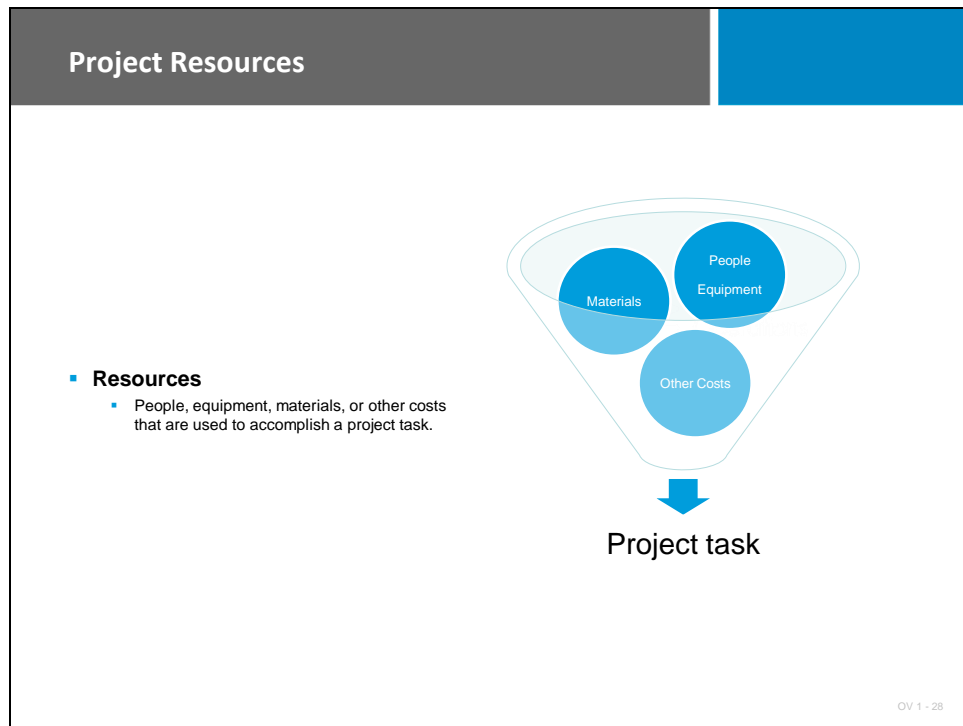
- A link is a dependency between the start and finish dates of two tasks.
- Linked tasks may have predecessors and successors.
- Changing a linked task affects its successors.
- The default link between tasks is Finish-to-Start (FS).
- Links between tasks are indicated with arrows.

Topic D: Add Resources to a Project



Legend
Operations

OV 1 - 27



Resource Sheet View

Microsoft Project - Commercial Construction(3) - Project Professional (Trial)

FILE TASK RESOURCE REPORT PROJECT VIEW FORMAT

Project Manager

Calibri 11

Font Schedule

Mark on Track
Respect Links
Inactivate

Manually Schedule Auto Schedule

Tasks Insert Properties Editing

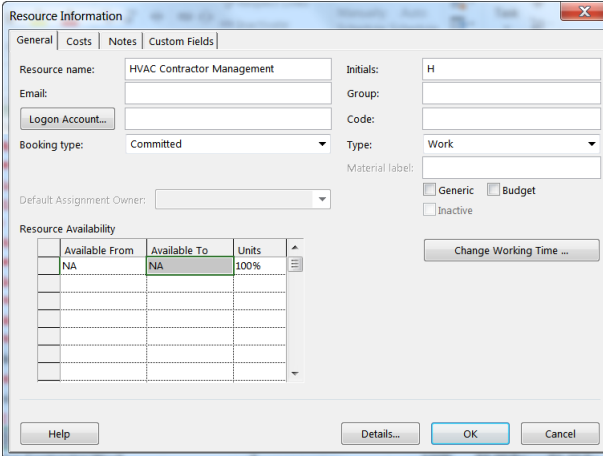
Clipboard View

Tracking Gantt Resource Form Resource Graph Resource Sheet Resource Usage

	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accru	Base
7	G.C. Survey Crew	Work		G		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
8	G.C. Rough Carpenter Crew	Work		G		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
9	G.C. Labor Crew	Work		G		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
10	G.C. Concrete Crew	Work		G		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
11	G.C. Finish Carpenter Crew	Work		G		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
12	Site Grading Contractor	Work		S		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
13	Plumbing Contractor	Work		P		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
14	Plumbing Contracto	Work		P		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
15	Electric Contractor	Work		E		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
16	Electric Contractor	Work		E		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
17	HVAC Contractor	Work		H		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
18	HVAC Contractor M	Work		H		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
19	Elevator Contractor	Work		E		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
20	Elevator Contractor	Work		E		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc
21	Steel Erection	Work		S		100%	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Stanc

READY NEW TASKS / AUTO SCHEDULED

Resource Information Dialog Box



The screenshot shows a 'Resource Information' dialog box with the following fields and sections:

- General Tab:**
 - Resource name: HVAC Contractor Management
 - Initials: H
 - Email: (empty)
 - Group: (empty)
 - Code: (empty)
 - Booking type: Committed
 - Type: Work
 - Material label: (empty)
 - Default Assignment Owner: (empty)
 - Material label checkboxes: ☐ Generic, ☐ Budget, ☐ Inactive
 - Change Working Time ... button
- Resource Availability Table:**

	Available From	Available To	Units
<input type="checkbox"/>	NA	NA	100%
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
- Buttons:** Help, Details..., OK, Cancel

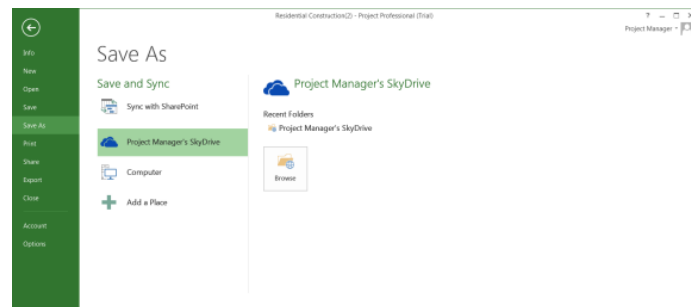
Topic E: Save a Project



Landed Operations

OV 1 - 31

The Save As Screen



Reflective Questions

1. What is your next big project—either at work or at home?
2. What tasks will need to be performed to complete your next project? What resources will you have available to assign to those tasks?

See Lecture
Operations

OV 1 - 33



Questions and Answers

Review Questions:

1. True or False: The Gantt Chart is the default view in Microsoft Project 2013.
 - A. True
 - B. False
2. A temporary initiative to create a unique result is a _____.
 - A. Project
 - B. Gantt Chart
 - C. Template
 - D. None of the above
3. Which of the following is NOT one of the five project management processes?
 - A. Initiating
 - B. Executing
 - C. Escalating
 - D. Closing
4. A _____ is anyone who is actively involved in the project or has an interest in its outcome.
 - A. Project manager
 - B. Triple constraint
 - C. Participant
 - D. Project stakeholder
5. What is the gradual, progressive increase in a project's scope?
 - A. Triple constraint
 - B. Time creep
 - C. Cost creep
 - D. Scope creep

Answer Key:

1. A
True. The Gantt Chart is the default view in Microsoft Project 2013.
2. A
A temporary initiative to create a unique result is a project.
3. C
The five project management processes are initiating, planning, executing, monitoring and controlling and closing.
4. D
A project stakeholder is anyone who is actively involved in the project or has an interest in its outcome.
5. D
Scope creep is the gradual, progressive increase in a project's scope.