# Chapter 1

# Project Management, Project 2013, and You

### In This Chapter

- Understanding the elements of a project
- Laying out the project manager's role
- Benefitting from Project 2013
- Exploring the software interface
- Finding help in Project

Welcome to the world of computerized project management with Microsoft Project. If you've never used project management software, you're entering a brave new world. It's like walking from the office of 25 years ago — with no fax, voice mail, or e-mail — into the office of today, with its wealth of high-tech devices.

Everything you used to do with handwritten to-do lists, word processors, and spreadsheets magically comes together in Project. However, this transition doesn't come in a moment, and you need a basic understanding of what project management software can do to get you up to speed. If you've used previous versions of Project, the overview in this chapter can refresh your memory and ease you into a few of the new Project 2013 features.

Even if you're a seasoned project manager, this chapter provides the foundation for how to work with Project.

## Introducing Project Management

You probably handle projects day in and day out. Some are obvious, because your boss named them so that any fool would know that they're projects: Acme Drilling Project or Network Expansion IT Project, for example. Others

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are less obvious, such as that presentation you need to put together for your director or that how-to guide on planting a vegetable garden in your backyard.

In this book, a project is defined as a unique venture undertaken to produce distinct deliverables, products, or outcomes. In the context of a project, a *deliverable* is a discrete component or item that meets the requirements of the project, such as a design document or a prototype. Projects have multiple variables; some are straightforward to define, and others aren't.

Using the information about variables in Table 1-1, you can say that *project management* is the practice of organizing, managing, and controlling project variables to meet the project outcomes and mission.

**Table 1-1 Project Variables**

| *Variable* | *Description* |
|---|---|
| *Defined* | |
| Scope | The work needed to produce the deliverables, products, or outcomes for the project |
| Time | The duration required to complete the project work |
| Cost | The funds required to complete the project |
| Resources | The people, equipment, material, supplies, and facilities needed to accomplish the project |
| *Undefined* | |
| Change | The type, timing, number, and degree of modifications from a project baseline; can affect the project's scope, time, cost, or resources |
| Risk | Uncertainty (associated with the scope, time, cost, resources, stakeholders, or environment) that can threaten the completion of any aspect of the project |
| Stakeholder | A person who can affect, or who is affected by, the project, either positively or negatively |
| Environment | The location, culture, or organization in which the project occurs |

# Defining project manager

Although understanding the role (let alone the usefulness) of certain managers isn't always easy, you can easily spot the value of a *project manager:* This person creates the master plan for a project and ensures that it is implemented successfully. Along the way, the project manager uses technical, business,

and professional skills to manage the completion of tasks and keep the schedule on track.

A truly professional project manager may have a degree in project management or a professional certification. For example, if you see the initials *PMP* beside a name, that person has been certified as a project management professional by the Project Management Institute, the leading global organization establishing project management standards and credentials, and offering educational and other types of resources in the field.

## Identifying what a project manager does

A project manager isn't always the highest authority in a project. Often, that role belongs to whoever manages the project manager — including, possibly, members of senior management. Rather, the project manager is the person who ensures that aspects of the project are integrated and assumes hands-on responsibility for successes as well as failures.

In project management parlance, the person who champions (and funds) a project is the *project sponsor.* Although the project manager may work for the project sponsor, the project often also has a *customer* — outside the project manager's own company or within it — for whom the end product is produced.

The project manager manages these essential pieces of a project:

- **Scope:** Define and organize all work that needs to be done in order to meet the project mission and create deliverables.
- **Schedule:** This element, which you create by working with Project, includes the estimated steps and associated timing involved in reaching the project goal.
- **Resources:** Assign resources and track their activities on the project as well as resolve resource conflicts and build consensus. This part of the job also involves managing nonhuman resources such as materials and equipment.
- **Cost:** Estimate project costs and apply those estimates across the schedule to create a time-phased budget.
- **Communication with the project team, management, and customers:** Communicating the project's status to its *stakeholders* (everyone who has a legitimate stake in its success) is a key responsibility.

Creating a logical balance of the defined variables of scope, time, cost, and resources is at the core of a good project manager's job throughout the life of

a project. Managing a project requires overseeing all its variables to ensure that the project goals are accomplished on time, within the limits of the budget, and using the assigned resources while also addressing risks, managing change, and satisfying stakeholders. Sound easy? Maybe not. However, one thing is certain: Having software to help organize and structure the work makes managing the project less daunting. That's where Project 2013 can help.

## Introducing Project 2013

Project 2013, which is a scheduling tool, helps you organize, manage, and control defined variables, as identified in the preceding section. The program indirectly helps you manage undefined variables as well. I show you how to use Project to organize and manage your work, create realistic schedules, and optimize your use of resources.

Take a moment to look at some of the wonderful ways in which Project can help you organize, manage, and control your project. Now that you have, or your company has, bought Project (and this book) and you're investing your time to understand how to use it, you can enjoy these benefits:

- **Use built-in templates to get a head-start on your project.** Project *templates* are prebuilt plans for a typical business project, such as commercial construction, an engineering project, a new product rollout, software development, or an office move.
- **Organize your project by phase, deliverable, geography, or any other method.** The outline format allows you to progressively elaborate the information in greater granularity depending on how detailed you want your plan to be.
- **Determine costs by your chosen method.** Examples are time period, resource type, deliverable, or cost type.
- **Organize resources by resource type.** Level your resources to avoid overallocation, or determine the impact on the duration of a task based on a change in resources.
- **Calculate costs and timing based on your input.** You can quickly calculate what-if scenarios to solve resource conflicts, maintain costs within your budget, or meet a deliverable deadline.
- **Use views and reports with the click of a button.** A wealth of information is now available to you — and those you report to. You no longer have to manually build a report on total costs to date to meet a last-minute request from your boss.
- **Manage complex algorithms** (that you couldn't even begin to figure out on your own) to complete such tasks as leveling resource assignments to solve resource conflicts, filtering tasks by various criteria, modeling what-if scenarios, and calculating the dollar value of work performed to date.

No matter how cool the tool, you have to take the time to enter meaningful data. Great software doesn't ensure great outcomes; it only makes them easier to achieve.

# Getting to Know You

The file you create in Project is a Project *schedule.* Similar to a multidimensional chess game from *Star Trek,* it has a plethora of data about various aspects of your project as well as graphical representations of that information. To help you make sense of all the information, Project provides more views than the Grand Canyon. These views help you observe the structure of your plan and see the progress in your project.

Some people refer to the project schedule as the project plan. In reality, the project plan *contains* the project schedule — plus information such as the budget, work breakdown structure, project life cycle, risk management plan, and many other ingredients necessary to effectively manage a project.

When you first open Project 2013, you see several options for starting a new project, as shown in Figure 1-1.

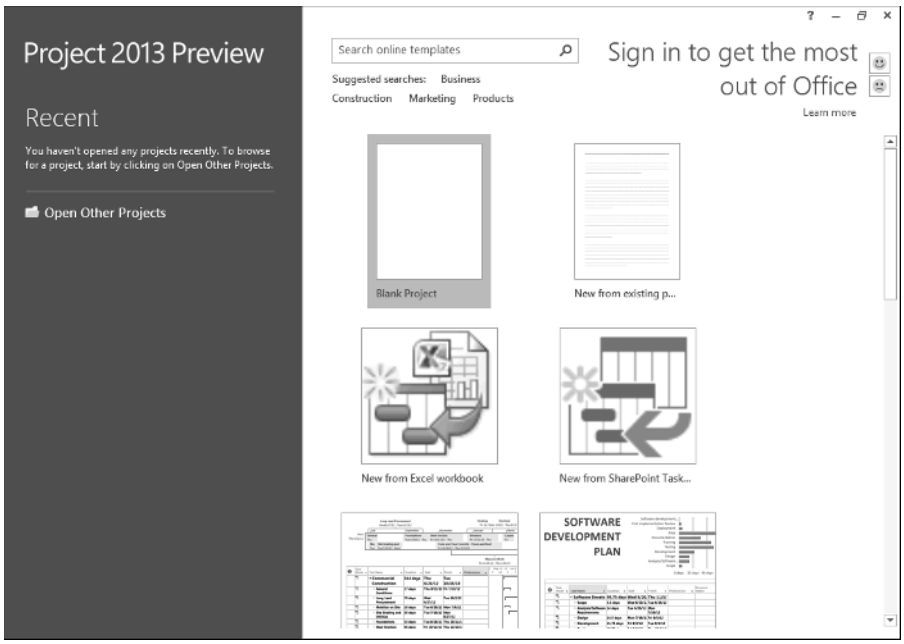


**Figure 1-1:** What you see when you open Project 2013.

You can open a blank project, create a new project from an existing project, or create a new project by importing information from Microsoft Excel or SharePoint. You can also take advantage of premade templates for common project types, such as these examples:

- Commercial construction
- Software development
- New product launch
- Residential construction

If you don't see the template you need, you can search for online templates by entering keywords in the search box at the top of the page. For purposes of this discussion, I assume that you're starting with a new, blank project.

When you open a new project, you see the Quick Access toolbar, a few file tabs, the Ribbon, the Timeline, a pane with a sheet and a chart, and the status bar, as shown in Figure 1-2.

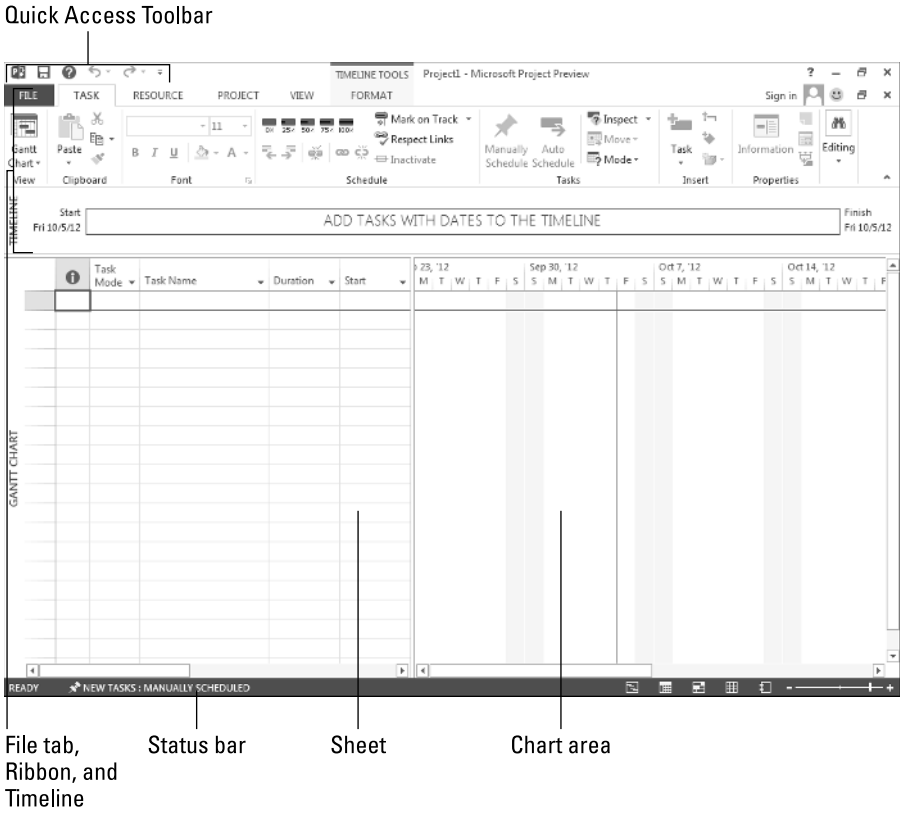


**Figure 1-2:** A blank project.

In Figure 1-2, you see Gantt Chart view. (I discuss views in Chapter 6.) For now, here's an overview of the major elements in Project (refer to Figure 1-2):

- **Quick Access toolbar:** The Quick Access toolbar, above and to the left of the Ribbon, is onscreen at all times and in all views.
- **File tab:** The file tabs organize commands based on a particular type of activity. For example, if you're working with resources, you'll likely find the command or setting you want on the Resource tab.
- **Ribbons:** Ribbons provide easy access to the most commonly used tools and commands. When you change tabs, the available tools on the Ribbon change.
- **Group:** A *group* is a set of related commands or choices on the Ribbon. For example, to format text in a cell on the sheet, first find the formatting information you need in the Font group on the Task ribbon.
- **Timeline:** The Timeline provides an overview of the entire project — a graphical view of the project from start to finish.
- **Sheet:** Similar to a spreadsheet, the sheet displays the data in the project. The default fields change depending on the file tab you're working in. You can customize the columns and fields in the sheet to meet your needs.
- **Chart:** The *chart* is a graphical depiction of the information on the sheet. Depending on the view or file tab you see, you might also see a bar chart depicting the duration of a task or a resource histogram showing resource usage.
- **Status bar:** The status bar, at the bottom of the Project window, has information on views, the zoom level, and newly entered tasks that are scheduled.

## Navigating file tabs and the Ribbon

Each of the six file tabs in Project shows different options on the Ribbon. In this section, I provide an overview of each file tab and of the Ribbon and the Quick Access toolbar. As delve deeper into Project, I elaborate in later chapters on various functions and commands on the Ribbon.

The first tab on the left, the File tab, stands out in bright green. After you click this tab, you see the menu bar down the left side, as shown in Figure 1-3.

The File tab is shown in Backstage view, where you find choices for working with files and changing options. For example, you can create a new project, open an existing project, save your current project, or print your current

project. From Backstage view, you can also share, export, or close your current project. If you're feeling adventurous, you can even customize the Ribbon and the Quick Access toolbar.

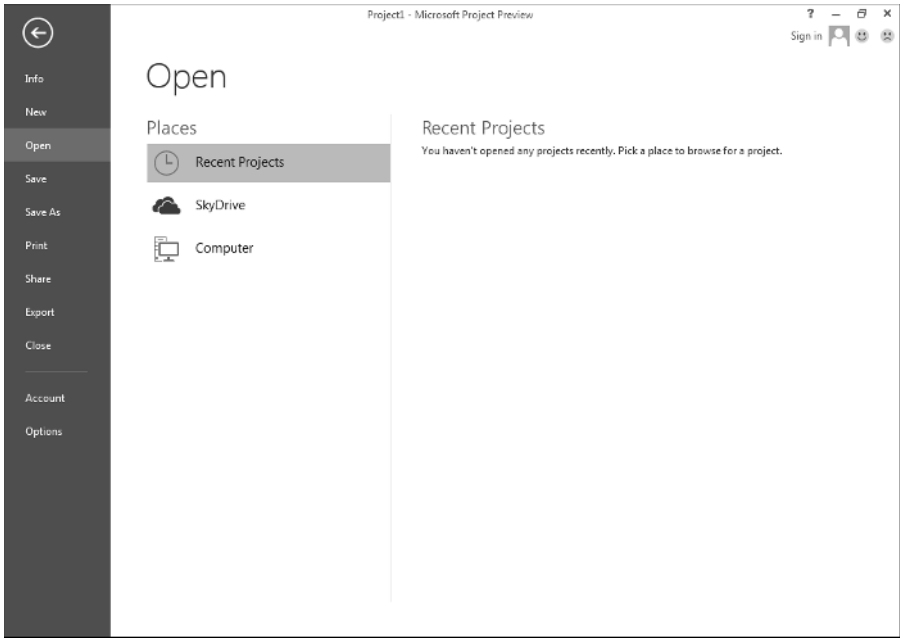


**Figure 1-3:** The File tab menu.

The Task file tab is where you spend a lot of your time in Project. As you can see in Figure 1-4, on the far left side of the Task file tab is the View. The default view (refer to Figure 1-2) is Gantt Chart view. It shows the sheet for task information and the chart that will display a bar chart representing the duration of each task.

In addition to Gantt Chart, you can choose these views:

| | |
|---|---|
| Calendar | Network Diagram |
| Resource Sheet | Resource Usage |
| Resource Form | Resource Graph |
| Task Usage | Task Form |
| Task Sheet | Team Planner |
| Timeline | Tracking Gantt |

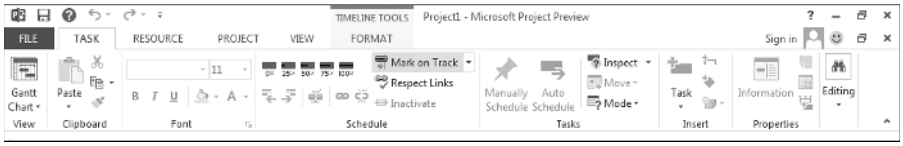


**Figure 1-4:** The Task file tab.

You may recognize some of the groups of commands on the Task file tab. For example, the Clipboard and Font groups are standard in Windows. Other groups, such as Schedule and Tasks, are specific to a particular view — in this case, Gantt Chart view. Look for the purple Gantt Chart Tools Format tab when you see the Task file tab in Gantt Chart view.

You use the Resource file tab, shown in Figure 1-5, to manage resources, such as adding, assigning, and leveling resources across tasks. In Project, resources include people, equipment, material, locations, and supplies. You can assign costs and calendars to resources. (I talk more about resources in Chapter 7.)

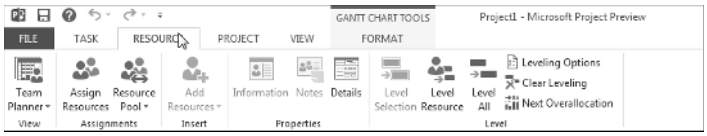


**Figure 1-5:** The Resource file tab.

On the Project file tab, you find commands to help you manage your project as a whole, rather than by task or resource. For example, you can enter or change the project start and finish dates, the project priority, and the baseline. You can also use this file tab to run reports. Figure 1-6 shows the Project file tab.

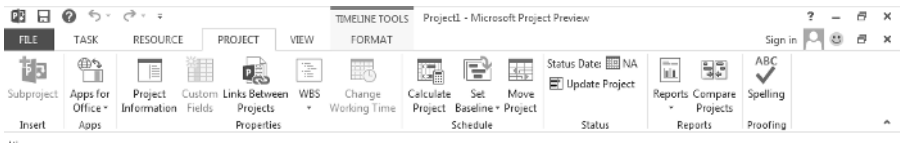


**Figure 1-6:** The Project file tab.

The View file tab lets you see some standard views. Examples are Task views, such as Gantt Chart or Network Diagram, and Resource views, such as Resource Usage or Resource Graph. You can use the View file tab to look at information sorted by date or a specific period. You can see the View file tab in Figure 1-7.

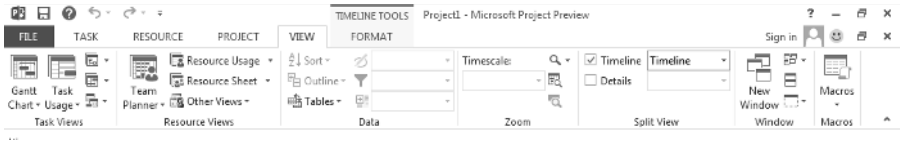


**Figure 1-7:** The View file tab.

The Format file tab has commands that help you present your schedule, such as font styles, page breaks, and column settings. You can see the options in Figure 1-8.

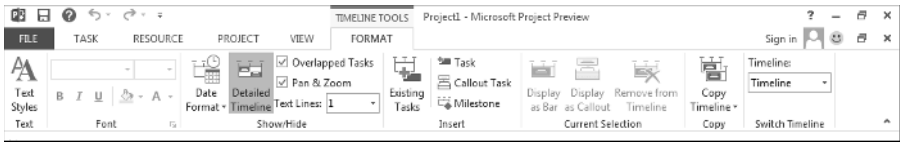


**Figure 1-8:** The Format file tab.

You can either pin or unpin (hide) the Ribbon to produce more real estate on your screen. The pushpin to the far right of the Ribbon pins it to your display, keeping it open and visible. The upward-facing arrow (^) on the far right side hides the Ribbon. You can also press Ctrl+F1 to show or hide the Ribbon.

## Displaying more tools

The Quick Access toolbar, which appears onscreen at all times, initially contains the Save, Undo, and Redo buttons. To add buttons, click the down arrow at the right end of the toolbar and select the menu option to hide or display it. If you don't see the command you want, select More Commands near the bottom of the menu to discover the other commands you can add.

The nifty *Timeline* tool shows the entire scaled time span of the project. You can add tasks or milestones to the Timeline. You can also copy the Timeline and paste it into reports or other presentations. To hide the Timeline, go to the View file tab and deselect the Timeline box. You can also work with the Timeline by right-clicking to insert tasks, copy the Timeline, change the font, or view detailed information.

The *status bar* sits at the bottom of the project, to indicate whether your tasks are manually or automatically scheduled. (Read more on this topic in Chapter 2.) The status bar also lets you move quickly to some of the most popular views, such as Gantt, Task Usage, Team Planner, Resource Sheet, and Reports. You can also adjust the time scale from a high-level, time scaled view to a detailed time-scaled view with the View slider, on the far right end of the status bar. I talk more about views in Chapter 6.

# Finding Help in Project

If you can get to work these days without mishap and turn on your computer, you probably know how to use the Help system in a software program. Table 1-2 offers a rundown of the types of help you can find in Project 2013 when you click the Help button. (Look for it above the right end of the Ribbon, or press F1.) As you can see, you can spend quite a bit of time simply working your way through all the Help topics in Project. Don't worry about studying them all, though: They'll be there when you need them.

**Table 1-2 Project Help Features**

| *Feature* | *How to Use It* |
|---|---|
| Help categories | The main part of the Project Help window displays a list of overall Help categories. Click a category and then click a topic in a subcategory. |
| Help drop-down menu | Determine whether you want Help topics from Office.com or from your computer. |
| Back and Forward buttons | Click these buttons on the Help window's toolbar to move between screens. |
| Home button | Click to redisplay the initial Help contents. |
| Print button | Click to print the current document. |
| Change Font Size button | Click to change the size of the text in the Help window. |
| Search | Enter a term or phrase to search for in the Search text box and then click the magnifying glass. To control which locations are searched, click the arrow to the right of the word *Search*, and make a selection. |