

# PART I

## Introduction to Project Management

**Chapter 1 Introduction**

**Chapter 2 Understanding Project Management Concepts**

**Chapter 3 Introduction to Microsoft Project 2013**

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# CHAPTER 1

## Introduction

- Using This Guide
- High-Level Overview of Microsoft Project 2013

### Learning Objectives

At the end of the chapter, the student should be able to:

- Know how to navigate this text and download the exercise files.
- Describe the key components of the Microsoft Project 2013 solution.

### Key Terms

- Microsoft Project Professional
- Microsoft Project Web App
- Microsoft Project Server
- Microsoft Project Standard
- Enterprise project management (EPM)

This guide will introduce you to the project manager's perspective on the latest version of Microsoft Project, Microsoft Project 2013. This set of software tools supports what is known as enterprise project management (EPM), the management of all projects across an organization.

EPM requires that accurate planning and scheduling information flow from the project manager to the technical experts doing the actual work of the projects and also to the executives making resource commitments and strategic decisions for the organization. Effective EPM allows organizations to better meet Portfolio commitments and achieve their goals. The process begins with the project manager, using a variety of tools described in this manual.

Project Assistants has been providing Project Management Theory and Microsoft Project training material for our training courses since the release of Microsoft Project version 3 (1993). Prior to the release of Microsoft Project 2013, we were surprised to find that there were no hands-on reference manuals available for Microsoft Project 2010 that also covered the enterprise features used in Microsoft Project Professional and Project Web Application. Based on an understanding from our customers that this sort of manual was needed, we moved to convert our own content into a formal, cohesive guide.

This text has been created to serve as that comprehensive reference and training guide, assembling content and best practices honed over many years of Microsoft Project and general project management training.

## 1.1 Using This Guide

Many training guides on technology are primarily manuals on features and functions of the software. The goal of this book is to show why those features and functions are important from a project management theory standpoint and then demonstrate how to effectively leverage that value. When used cover-to-cover, this text serves as a comprehensive guide to running a project from initiation to closeout with guides along the way for how to use Microsoft Project to facilitate that.

The information in this book was selected based on our 20+ years of project management and Microsoft Project consulting experience. In selecting the features and functions to be covered, we selected a middle-of-the-road approach that deliberately glosses over simple topics that are assumed to be known by the reader. A more difficult decision was faced when determining which advanced features (such as earned value management) to cover in a book of this nature. The features chosen for coverage in this book represent the interests of the majority of organizations with which we have interacted.

There is no need to follow the order in which the material is presented. For example, you may want to start with the overview on Navigating in Microsoft Project 2013 Views, since knowing where to find information is the foundation to unlocking the powerful potential of the tool.

If you are skipping around the book, note that the features are demonstrated in great detail the first time through to take out any guesswork, so if you get stuck, you can always refer back to the first section that covers that feature. Also, many of the exercises build on each other, so you may have to start back on earlier chapters if you'd like your exercise files to be up-to-date.

This text covers Microsoft Project 2013 Standard, Microsoft Project 2013 Professional, Microsoft Project Server 2013, Microsoft Project Web Application 2013 (PWA), and Microsoft Project Online 2013 for Office 365. This text is presented in the context of what a project manager needs to know. As a result, features not relevant to a project manager, such as the Project Server administrator functions, are not covered. Everything in this book is usable in Microsoft Project Professional, and all but Part IV "Enterprise Project Management" applies to Microsoft Project Standard as well.

With the release of Microsoft Project 2013, Microsoft now offers an off-premises hosted version of Microsoft Project that is referred to as Microsoft Project Online. This tool is part of the Microsoft Office 365 hosted solution family of products that is intended for organizations that wish to reap the benefits of using this technology in a software-as-a-service (SaaS) environment. From the perspective of a project manager using Microsoft Project, the vast majority of the features and functions remain unchanged. When the Microsoft Project Professional and PWA features are covered, nuances related to the use of these features in Project

Online will be pointed out as they are introduced. Due to the many similarities between Project Server hosted on premises and Project Online hosted off-premises, the differences are few. As a result, these differences are highlighted in Part IV chapters as they come up, instead of in a separate, standalone chapter.

The exercise files use a standardized style to explain how to navigate the ribbon. The ribbon is what we call the tabulated menu bar format that Microsoft has been using since the release of Microsoft Project 2010. All commands are in bold and italics, and subcategories of the ribbon are separated by “colons.” When it says, for example, ***Task:View:Resource Usage View***, that means, “Go to the Task tab in the ribbon, then under the subcategory labeled View, you will find the Resource Usage View.”

## Downloading Exercise Files Used in This Book

In order to use the exercise files in this book, you will need to download and potentially unzip them, depending on your browser and method of download.

These files are available by download for free on Project Assistants’ website and can be re-downloaded at any time. To download them:

- ◆ Go to our updates and materials webpage:  
**<http://projectassistants.com/proj2013-book-updates/>**
- ◆ Click “Register” and fill in the appropriate information.
- ◆ You will receive an email with a download link for the compressed exercise file.
- ◆ Once the file is downloaded, unzip the exercise files to a location of your choice.

Our updates and materials webpage will also host any news regarding significant corrections, updates to the text, or modifications to the supporting exercise files:

**<http://projectassistants.com/proj2013-book-updates/>**

If you have any questions about downloading and using the exercise files, please contact Project Assistants at [info@projectassistants.com](mailto:info@projectassistants.com).



### NOTE

#### project assistants



Project Assistants offers a full spectrum of Microsoft Project training solutions that can be customized to reflect your organization’s unique needs. Please visit our website to learn more about our training offerings:

<http://projectassistants.com/solutions-type/training>

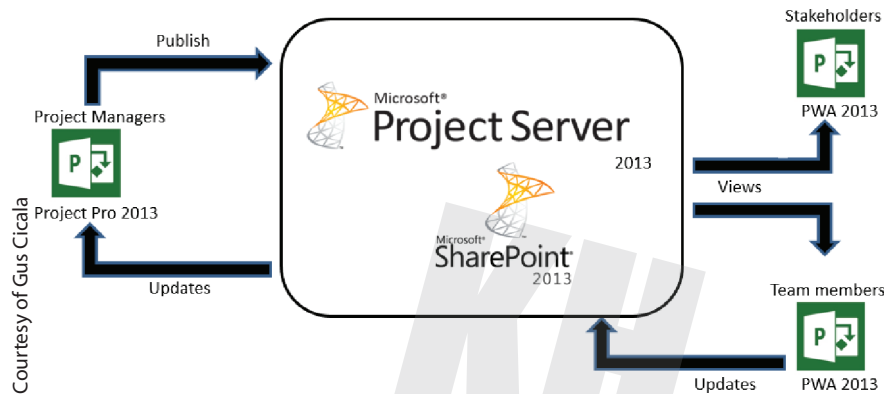
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## 1.2 High-Level Overview of Microsoft Project 2013

Microsoft Project 2013 is a set of integrated software applications that together provide the tools needed for enterprise project management (EPM). The three basic components are presented in the following figure:



**Figure 1** Microsoft Project 2013 components

Note: If you are using Microsoft Project 2013 Standard (instead of Microsoft Project 2013 Professional) this diagram does not apply.

If using Microsoft Project Server, the EPM process begins with a project manager developing a project plan using Microsoft Project 2013 Professional. This version supports EPM by optionally connecting with Project Server 2013 when starting Microsoft Project 2013 Professional.

The project is sent to a server running Microsoft Project Server 2013, in a process is called “publishing” the project. Once the project is published, it becomes available to other parts of the organization.

Assignments for team members are sent to team members who may receive an automatic email notification that they have new or changed assignments to view.

Team members can view their assignments and report progress on those tasks using a web-based tool called Microsoft Project Web App. When they update the task status, the project manager can view those updates using Web App and approve or reject them. Once approved, the information automatically updates the project plan itself, freeing the project manager to focus on the effects of those updates.

The potential weak link in any such system is, of course, the quality and usefulness of the actual project plans that are shared with the rest of the project and management teams.

As with all Microsoft applications, there are multiple ways to do many tasks; rather than cover every possible method, we will recommend the best practice in each area and list alternatives with brief directions for their use.