

# **Project Planning**

This quick reference is for Microsoft Project Standard 2013 on Windows 7

# **Quick Reference**

## Project 2013 Tabs

# Task



#### Resource

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## Report



# Project

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#### Format

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# Certification Test Goals

This module sets out essential concepts and skills relating to the ability to use

project management software to prepare project plans and monitor projects including planning and managing time, costs, tasks, and resources.

Successful candidates will be able to:

- Understand the key concepts relating to managing projects.
- Use a project management application to create a new project and maintain an existing project.
- Create and schedule tasks and add project constraints and deadlines.
- Assign costs and create and assign resources to tasks.
- View the critical path, monitor progress and reschedule work.
- Prepare and print outputs, including charts and reports.

# **Keyboard Shortcuts**

Purpose	Keyboard Shortcut
Open	CTRL+O
Save	CTRL+S
Print	CTRL+P
Close	CTRL+W
Undo	CTRL+Z
Redo	CTRL+Y
Help	F1
Switch between apps	ALT+TAB
Cut	CTRL+X
Сору	CTRL+C
Paste	CTRL+V
Hide subtasks	ATL+SHIFT+HYPHEN
Indent a selected task	ATL+SHIFT+RIGHT ARROW
Show subtasks	ATL+SHIFT+=
Show all tasks	ATL+SHIFT+*

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# 1 Project Management Tools

#### 1.1 Key Concepts

- 1.1.1 Understand the term project.
  - A temporary and often collaborative activity that is carefully planned to achieve a particular aim.
- 1.1.2 Recognise the main elements of managing a project like:
  - Planning the project
  - Managing the schedule
  - Communicating project information

#### 1.1.3 Understand the advantages of using a project management application like:

- Efficient project design
- Ease of project plan maintenance
- Effective activity representation

## 1.1.4 Understand the tools and features of a project

- A Gantt chart is a type of bar chart that illustrates a project schedule, including start and finish dates.
- A network diagram is a model designed to analyse and represent the tasks involved in completing a project.
- A work breakdown structure is a tool used to define and group a project's tasks, so as to organise and define the total work of the project.

# 1.1.5 Recognise that managing projects involves

- balancing:
- Work
- Time

2

- Resources
- Cost

## Project Creation

#### 2.1 Working with Projects

- 2.1.1 Open a project management application.
  - Click the Start button.
  - Select All Programs.
  - Click Microsoft Project 2013.

# 2.1.1 Close a project management application.

 Click the Close button in the upper-right corner of the Project 2013 program window.

#### 2.1.1 Open projects

- Click the FILE tab.
- Click Open.
- Select project(s) to open and click Open.
- 2.1.1 Close projects
  - Click the FILE tab.
  - Click Close.

## 2.1.2 Save a project to a location on a drive.

- Click the FILE tab.
- Click Save.
- Create a file name and select the location.
- Click Save

# 2.1.2 Save a project under another name to a location on a drive.

- Click the FILE tab.
- Click Save As.
- Enter a new file name over the existing file
- name and select the location.
- Click Save.

#### 2.1.3 Save a project as another file type like: template, web page, spreadsheet, CSV, XML, text file, pdf.

- Click the FILE tab.
- Select Save As.
- Click on the Save as type drop-down menu and
- select a file type.
- Click Save.

#### 2.1.4 Change between project view modes like: Ganttchart, network diagram.

- On the TASK tab, in the View group, click the
- Gantt Chart arrow below the Gantt Chart button.
- Click Gantt Chart or Network Diagram to switch to the selected view

# 2.1.5 Use magnification/zoom tools.

ICDL Project Planning 2013 QRG v1

On the VIEW tab, in the Zoom group, click the Timescale drop-down box arrow. Select a time unit.

Quarter Days Days Weeks Thirds of Months Quarters Quarters 27 Jx	Hours	selected Tasks
Months Quarters 27 Ju	Quarter Days Days Weeks Thirds of Months	ie timeline
	Months Quarters	27 Ju

 This can also be done using the Zoom Slider on the bottom right cormer of the screen. Drag the Zoom slider right to increase the tiescale. Drag the Zoom slider left to decrease the timescale.
 Starting a New Project 3

3.1

Tasks

3.1.1 Create tasks.

3.1.1 Modify tasks.

3.1.2 Copy tasks

3.1.2 Move tasks

3.1.2 Delete Tasks

•

**Creating Tasks** 

Click into an empty Task Name field.

Enter additional task name content or delete

Click on a task in the Task Name column.

On the TASK tab, in the Clipboard group, click

Click on a new location within the Task Name

On the TASK tab, in the Clipboard group, click

On the TASK tab, in the Clipboard group, click

Click on a new location within the Task Name

On the TASK tab, in the Clipboard group, click

move and then drag up or down to new location.

Move can also be done by selecting task to

Select the row containing the task to delete

Press the Delete key, or right-click and select

To create a subtask, on the TASK tab, in the

hedule group, click the Indent Task button

To create a summary task, on the TASK tab, in

To modify a summary task to be a subtask, on

the TASK tab, in the Schedule group, click the

Indent Task button. (right green arrow button).

To modify a subtask to be a summary task, on

the TASK tab, in the Schedule group, click the Outdent Task button. (left green arrow button)

To view subtasks, on the VIEW tab, in the Data

Elapsed task duration is based on a 24-hour day

and a 7-day week, including holidays and other nonworking days.

Duration is the active working time to complete

Effort is the amount of work required to carry out

Estimated task duration is the estimated working

In the Duration column, click on the Duration for

Enter the duration required; for example 1D for

In the Duration column, click on the Duration for

Duration in Time unit abbreviation

Change the duration or delete the duration.

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W

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On the TASK tab, in the Schedule group, click

a task; for example, two people working for three days is 6 days effort (or work).

time to complete a task, shown by a ?; for

dent Tas

le group, click the Ou

Click on a task in the Task Name column.

Enter a task name.

the Copy button.

the Paste button

the Cut button.

the Paste button.

**Delete Task** 

3.1.3 Create subtasks and summary tasks.

3.1.3 Modify subtasks and summary tasks

3.1.3 View subtasks and summary tasks.

Click All Subtasks.

3.1.4 Understand task duration options:

example, 1 day?

Press the Return key.

the task to modify

Minutes

Hours

Davs

Weeks

Months

3.1.6 Split tasks.

Press the Return key.

the Split Task button.

a task.

3.1.5 Set task duration.

a task

1 day.

3.1.5 Modify task duration.

.

(right green arrow button).

button. (left green arrow button)

group, click the Outline button.

To hide subtasks, click Hide Subtasks,

column

column.

Click into a Task Name field.

existing task name content.

# 2.2 Starting a New Project2.2.1 Create a new project based on default template.

- Click the FILE tab.
- Click New
- Click Blank project

#### 2.2.1 Create a new project based on other available

- template.
- Click the FILE tab.
- Click New.
  - Search for templates or click on a template.
  - In the preview dialog box, click Create.
- 2.2.2 Understand how choosing to schedule from a start date, finish date will impact on the project schedule.
  - Schedule from a start date All tasks will start as soon as possible by default.
  - Schedule from a finish date Tasks on the critical path are started as late as possible by default
- 2.2.3 Enter basic project information such as start date or finish date, scheduling options and project properties like: project title, project manager.
  - Click the FILE tab.
  - Click Info.
  - Click Project Information and Advanced Properties. Project properties dialog box will appear where you can key in information such as Project Title and Project Manager.

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Calgorys	
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- Enter a project title in the Title text box.
- Enter a project the in the fine text box.
- Enter a project manager in the Manager text box
- Click OK

#### 2.2.4 Set up calendar options like: base calendar.

- On the PROJECT tab, in the Properties group, click the Project Information button.
- Select a calendar from 24 Hours, Night Shift, Standard.
- Click OK.

#### 2.2.4 Set up calendar options like: working time.

- On the PROJECT tab, in the Properties group, click the Change Working Time button.
- Click the Work Weeks tab.
- Double-click on [Default] in the Name column.
- Edit a day(s) working time.
- Click OK.

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22 1000	Mail you need		1	-	-		1	-		
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- 2.2.4 Set up calendar options like: nonworking time.
  - On the PROJECT tab, in the Properties group, click the Change Working Time button.
    - Click the Work Weeks tab.

Click OK

- Double-click on [Default] in the Name column.
- Edit a day(s) non-working time.

- In the Gantt Chart, click the location on a task to create a split.
- Drag the mouse button from the start of the split to the location where you want work on the task to begin again.

-	split lask:		10	20
Schedule	d Start.	Sun 27/11/11	10	INI
-	Click to insert a split on the t	ask.		

#### 3.1.7 Understand the term milestone.

 A reference point used to mark a point in time or a major event in a project.

## 3.1.8 Create project milestones.

 On the TASK tab, in the Insert group, click the Milestone button.

# 3.1.9 Create, modify recurring tasks.

- Click the first empty field in the Task Name column.
- On the TASK tab, in the Insert group, click the Task arrow below the Task button.
- Click Recurring Task.
- Enter the recurring task information.
- Click OK.

# 3.2 Scheduling and Relationships

# 3.2.1 Understand logical relationships between tasks: finish to start, start to start.

Finish to start – The second task cannot start until the first task finishes.

#### č\_\_\_\_\_

• Start to start – The second task can start as soon as the first task starts.

#### 

## 3.2.2 Create relationships between tasks: finish to start.

- To create a finish to start relationship, select the desired tasks to create a relationship between them.
- On the TASK tab, in the Schedule group, click the Link Tasks button.

#### 3.2.2 Create relationships between tasks: start to start.

- To create a start to start relationship, select the tasks to create a relationship between them.
- On the TASK tab, in the Schedule group, click the Link Tasks button.
- In the Gantt Chart, double-click on the link between the two tasks.
- Pick the dependency type Start-to-Start (SS) from the Type list.

# 3.2.2 Modify relationships between tasks: finish to start, start to start.

- In the Gantt Chart, double-click on the link between the two tasks.
- Change dependency type to Start-to-Start (SS) or Finish-to-Start (FS).
- Click OK.

# 3.2.2 Delete relationships between tasks: finish to start, start to start.

- In the Gantt Chart, double-click on the link between the two tasks.
- Click Delete.
- 3.2.3 Understand the terms lead time, lag time.
  - Lead time An overlap between tasks that have a dependency.
  - Lag time A delay between tasks that have a dependency.

#### 3.2.4 Add task lag time, lead time.

- On the TASK tab, in the Properties group, click the Information button.
- In Task Information, click the Predecessors tab and select the relevant lag cell.
- To enter lead time, type a negative number or negative percentage, such as -2d for two days of lead time.
- To enter lag time, type a positive number or percentage, such as 50% for half the predecessor task's duration in lag time.
- Click OK.

## 3.2.4 Edit task lag time, lead time.

- On the TASK tab, in the Properties group, click the Information button.
   In Task Information, click the Predecessors tab
- and select the relevant lag cell.
- To edit lead time, type a negative number or negative percentage.

 To edit lag time, type a positive number or percentage.

# Click OK.

# 3.3 Constraints and Deadlines

- 3.3.1 Understand task constraint options like:
  - As late as possible Task will start as late as possible based on other constraints and relationships
  - As soon as possible Task will start as soon as possible based on other constraints and relationships
  - Must finish on Task will finish on the specified
  - Must start on Task will start on the specified

# 3.3.2 Add constraints to tasks.

- On the TASK tab, in the Properties group, click the Information button.
  - In the Task Information, click the Advanced tab.
  - Choose a Constraint type and a Constraint date.
- Click OK.

#### 3.3.2 Modify constraints to tasks.

- On the TASK tab, in the Properties group, click the Information button.
- In the Task Information, click the Advanced tab.
- Modify the Constraint type and Constraint date.

# Click OK. 3.3.2 Delete constraints to tasks.

- On the TASK tab. in the Properties
  - On the TASK tab, in the Properties group, click the Information button.
  - In the Task Information, click the Advanced tab.
  - Modify the Constraint type to As Soon As Possible.
  - Click OK

## 3.3.3 Understand the term deadline.

 The latest date by which a task should be completed.

#### 3.3.4 Create a deadline

- On the TASK tab, in the Properties group, click the Information button.
- In the Task Information, click the Advanced tab.
- Enter a date into the deadline box or click a

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Constrain task	
Deadjine	
Constraint type:	Constraint dage
	<ul> <li>Effort driven</li> </ul>
Calendar	<ul> <li>Scheduling ignores resource calendars</li> </ul>
W85 code:	
Earned palue method	
있음S code: Earned galue method Mark task as milentone Some of the fields above are not editab	• In because the task is Manually Scheduled.

## Click OK

# 3.4 Notes, Hyperlinks

- 3.4.1 Add a note for a task.
- Select a task.
  - On the TASK tab, in the Properties group, click the Information button.
  - Click the Notes tab and enter the information you want.
    Click OK.
- 3.4.1 Edit a note for a task.

# Select a task.

- On the TASK tab, in the Properties group, click the Information button.
- Click the Notes tab and edit the information you
- want.
- Click OK.

## 3.4.1 Remove a note for a task

- Select a task.
- On the TASK tab, in the Properties group, click the Information button.
- Click the Notes tab and delete the text of the note.
- Click OK.

# 3.4.2 Insert a hyperlink for a task.

- Right-click on the task and select Hyperlink.
   Select the file, location or e-mail address to hyperlink to.
- Click OK.

#### 3.4.2 Edit a hyperlink for a task.

Edit a hyperlink for a task.

hyperlink to.

3.4.2 Remove a hyperlink for a task.

Click Clear Hyperlink.

**Resources and Costs** 

Click OK.

Click OK.

4.1.1 Identify resource types like:

People

Work

Duration.

Units.

work.

4.1.3 Create, delete resources

Resource.

rates.

Materials

Equipment

4.1.2 Understand the relationship between duration,

16 hours X 300% = 48 hours

48 hours / 300% = 16 hours

48 hours / 16 hours = 300%

w. and select Reso

Press the Return key.

w. and select Res

Select a task.

Task: Complete Pla

Advin Cast
 Advin Cast
 Advin Cast
 Backhoe Operator
 Cable Specialist
 Carpet
 Carpet Lever

required

units.

units.

Costs

4.2

Click Assign.

Select a task.

Click Remove

Select a task.

Click Replace.

Click OK.

4.1.4 Remove resource assignments and associated

Select the resource to remove.

4.1.4 Replace resource assignments and associated

Select the resource to replace.

4.2.1 Understand the terms fixed cost, variable cost.

Choose a new resource.

4.1.3 Modify resource details like: name, type, units.

Click on the resource to be modified.

details like name, type, units, rates

4.1.4 Add resource assignments and associated units.

work and resource. Understand that if one element

Duration multiplied by Resource Units equals

changes there is an impact on another element.

Work divided by Resource Units equals

Work divided by Duration equals Resource

If one element of the formula changes there is

an impact on another element, for example an

increase in duration will lead to an increase in

Click on the TASK tab, click on the Gantt Chart

In the RESOURCE tab, go to the Insert group,

Click on the TASK tab, click on the Gantt Chart

In the Resource Information dialog box modify

On the RESOURCE tab, in the Assignments group, click the Assign Resources button.

Select the resource to assign and enter the units

On the RESOURCE tab, in the Assignments group, click the Assign Resources button.

On the RESOURCE tab, in the Assignments

Fixed cost is a set cost for a task regardless of

task duration or work performed by a resource.

group, click the Assign Resources button.

Regisce... Graph

Help

Enter or delete the details of a resource.

and click on the Add Resources button. Select a

Resources

4.1

Right-click on the task and select Hyperlink.

Right-click on the task and select Hyperlink.

Edit the file, location or e-mail address to

 Variable cost is a cost that changes throughout the project depending on its availability or use.

#### 4.2.2 Assign, modify fixed costs.

- In the task list, assign, modify the fixed cost in the Fixed Cost column for the relevant task.
- Press the Return key.
- 4.2.3 Assign, modify variable costs.
  - On the RESOURCE tab, in the View group, click the Resource Sheet button.
  - Enter the costs required for the resource.
  - Press the Return key.
  - In the task list, assign the resource to a task and view the Cost column for the task.
  - Press the Return key.

## Project Monitoring

#### 5.1 Critical Path

#### 5.1.1 Understand the terms critical task, critical path.

- Critical task A task on the critical path
  - Critical path A sequence of tasks that must all be completed on time for the project to finish on schedule.

#### 5.1.2 Identify critical tasks and show the critical path.

- On the FORMAT tab, in the Bar Styles group, check the Critical Tasks checkbox.
- Critical tasks will now appear in red on the Gantt chart.

#### 5.2 Monitoring Progress and Rescheduling

#### 5.2.1 Create, save a baseline.

- On the PROJECT tab, in the Schedule group,
- click the Set Baseline button.
- Click Set Baseline.

#### In the Set Baseline dialog box, click Set Baseline and click for the Entire project or Selected tasks.

-	Received and The 22 PC 4 C	
	baseline (last saved on thu 25/06/16)	`
Set inte	rim <u>p</u> lan	
⊆opy;	Scheduled Start/Finish	-
Into:	Start1/Finish1	,
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# 5.2.1 Clear a baseline.

- On the PROJECT tab, in the Schedule group, click the Set Baseline button.
- Click Clear Baseline.
- In the Clear Baseline dialog box, click on a baseline in the Clear baseline plan drop-down box.
- Click to clear for the Entire project or Selected tasks.
- Click OK.

#### 5.2.2 Show, hide progress line.

- On the FORMAT tab, in the Format group, click the Gridlines button.
- Click Progress Lines.
- Click Plogless Lifles.
- Select, deselect to display a current progress line.
- Select, deselect to display at recurring intervals.
- Click OK.

# 5.2.3 Show columns like: % complete, fixed cost, deadline.

- On the FORMAT tab, in the Columns group, click the Insert Column button.
- Select a column type.

# 5.2.3 Hide columns.

Select the column to hide.

- On the FORMAT tab, in the Columns group,
- click the Column Settings button. Click Hide Column.
- 5.2.4 Sort tasks.

•

- On the VIEW tab, in the Data group, click the Sort button.
- Select a sort type to apply or select Sort By to create a custom sort.
- 5.2.4 Filter tasks.

- On the VIEW tab, in the Data group, click the Filter drop-down menu box.
- Select a built in filter to apply or select More Filters for additional filter options.
- 5.2.5 Update task progress.
  - On the TASK tab, in the Schedule group, click the desired % Complete button.

#### 5.2.6 Reschedule incomplete work.

- On the PROJECT tab, in the Status group, click the Update Project button.
- Click Reschedule uncompleted work to start after and select a date.
- Select either to reschedule for the entire project or selected tasks.

#### Click OK.

Update Project	
Update work as complete through:	Thu 23/06/16
Sgt 0% or 100% complete only	
<u>Reschedule uncompleted work to start after:</u>	Thu 23/06/16
For: () Entire project () Selected tasks	

# 5.2.7 Display current project schedule and baseline.

- On the FORMAT tab, in the Format group, click
- the Gridlines button and click Progress Lir
- Select to display the Current progress line.
- Select to display progress line in relation to the Baseline plan.

Recurring intensits Display progress (Ines: Display Source(sty O Monthly	Wogress Line Dates
Display progress lines:	
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# 6 Prepare Outputs

# 6.1 Setup

- 6.1.1 Change page orientation: portrait, landscape.
  - On the FILE tab, click Print.
  - Click Portrait Orientation or Landscape
     Orientation.

## 6.1.1 Change paper size.

- On the FILE tab, click Print.
- Select a paper size.
- 6.1.2 Change page margins: top, bottom, left, right.
  - On the FILE tab, click Print.
  - Click Page Setup.
  - On the Margins tab, enter a top, bottom, left, right margin.
  - Click OK.
- 6.1.3 Prepare a Gantt chart, network diagram for print using options like: columns to print, notes.
  - On the FILE tab, click Print.
  - Click Page Setup.
  - Click the View tab.
  - To print all sheet columns, check the print all sheet columns checkbox.
  - To print a specified number of columns, check the print first [insert required number] columns on all pages option and enter the required number.
  - Check the print notes checkbox to print notes.
  - Click OK.
- 6.2 Print
- 6.2.1 Preview a Gantt chart, network diagram, report.
  - On the FILE tab, click Print.
  - A preview is available on screen.
- 6.2.2 Print a Gantt chart, network diagram, report from an installed printer using output options like: entire document, specific pages, number of copies.
  - On the FILE tab, click Print.
  - Click the Print button.
  - To print the complete project, under Settings, select Print Entire Project.

To print specific pages, under Settings, select Print Specific Pages and enter specific page numbers and/or page ranges (dates) to print. Under Copies, enter the number of copies to print. Click Print.

For more information, visit: www.ecdl.org