

LEARNING MADE EASY



Microsoft®

Project 2019

for
dummies®
A Wiley Brand



Manage project resources,
calendars, and budgets

Create a dynamic schedule
that keeps a project moving

Get the “golden rules” that
keep projects on track

Cynthia Snyder Dionisio



Project 2019

by Cynthia Snyder Dionisio

for
dummies[®]
A Wiley Brand

Project 2019 For Dummies®

Published by: **John Wiley & Sons, Inc.**, 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

Copyright © 2019 by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Trademarks: Wiley, For Dummies, the Dummies Man logo, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and may not be used without written permission. Microsoft is a registered trademark of Microsoft Corporation. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc. is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002. For technical support, please visit <https://hub.wiley.com/community/support/dummies>.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Control Number: 2018967613

ISBN 978-1-119-56512-3 (pbk); ISBN 978-1-119-56509-3 (ebk); ISBN 978-1-119-56514-7 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

Contents at a Glance

Introduction	1
Part 1: Getting Started with Project 2019	5
CHAPTER 1: Project Management, Project 2019, and You	7
CHAPTER 2: Starting the Project	19
CHAPTER 3: Becoming a Task Master	39
CHAPTER 4: The Codependent Nature of Tasks	53
CHAPTER 5: Estimating Task Time	65
CHAPTER 6: Check Out This View!	81
Part 2: Managing Resources	101
CHAPTER 7: Creating Resources	103
CHAPTER 8: Working with Calendars	119
CHAPTER 9: Assigning Resources	135
CHAPTER 10: Determining a Project's Cost	147
Part 3: Before You Baseline	157
CHAPTER 11: Fine-Tuning Your Plan	159
CHAPTER 12: Negotiating Project Constraints	173
CHAPTER 13: Making the Project Look Good	187
CHAPTER 14: It All Begins with a Baseline	205
Part 4: Staying on Track	213
CHAPTER 15: On the Right Track	215
CHAPTER 16: Project Views: Observing Progress	237
CHAPTER 17: You're Behind — Now What?	249
CHAPTER 18: Spreading the News: Reporting	265
CHAPTER 19: Getting Better All the Time	287
Part 5: The Part of Tens	297
CHAPTER 20: Ten Golden Rules of Project Management	299
CHAPTER 21: Ten Cool Shortcuts in Project 2019	307
Appendix: Glossary	313
Index	321

Table of Contents

INTRODUCTION	1
About This Book	1
Foolish Assumptions	2
Icons Used in This Book	3
Beyond the Book	3
Where to Go from Here	3
PART 1: GETTING STARTED WITH PROJECT 2019	5
CHAPTER 1: Project Management, Project 2019, and You	7
Introducing Project Management	7
Defining project manager	8
Identifying what a project manager does	9
Introducing Project 2019	10
Getting to Know You	11
Navigating Ribbon tabs and the Ribbon	13
Displaying more tools	17
Tell Me What You Want to Do	18
CHAPTER 2: Starting the Project	19
Creating the Project Charter	20
Introducing the Work Breakdown Structure (WBS)	22
Organizing the Work	23
Starting the Project	24
Entering project information	25
Weighing manual scheduling versus automatic scheduling	27
Entering the WBS	29
Entering tasks	30
Importing tasks from Outlook	32
Inserting hyperlinks	34
Inserting one project into another	35
Promoting and demoting: The outdent-and-indent shuffle	36
Saving the Project	37
CHAPTER 3: Becoming a Task Master	39
Creating Summary Tasks and Subtasks	39
How many levels can you go?	41
The project summary task	41

Moving Tasks Up, Down, and All Around	43
Moving tasks with the drag-and-drop method	43
Moving tasks with the cut-and-paste method	44
Now You See It, Now You Don't: Collapsing and Expanding the Task Outline	44
Showing Up Again and Again: Recurring Tasks	47
Setting Milestones	48
Deleting Tasks and Using Inactive Tasks	49
Making a Task Note	50
CHAPTER 4: The Codependent Nature of Tasks	53
How Tasks Become Dependent	54
Dependent tasks: Which comes first?	54
Dependency types	55
Allowing for Murphy's Law: Lag and lead time	58
Setting the Dependency Connection	59
Adding the dependency link	59
Words to the wise	61
Understanding that things change: Deleting dependencies	62
CHAPTER 5: Estimating Task Time	65
You're in It for the Duration	66
Tasks come in all flavors: Identifying task types	66
Effort-driven tasks: $1 + 1 = \frac{1}{2}$	69
Estimating Effort and Duration	70
Estimating techniques	71
Setting the task duration	72
Controlling Timing with Constraints	74
Understanding how constraints work	74
Establishing constraints	75
Setting a deadline	76
Starting and Pausing Tasks	77
Entering the task's start date	77
Taking a break: Splitting tasks	78
CHAPTER 6: Check Out This View!	81
A Project with a View	81
Navigating tabs and views	82
Scrolling around	84
Reaching a specific spot in your plan	85
More Detail about Views	86
Home base: Gantt Chart view	86
Resourceful views: Resource Sheet and Team Planner	87
Getting your timing down with the Timeline	88

Going with the flow: Network Diagram view	89
Calling up Calendar view	90
Customizing Views.	91
Working with view panes	91
Modifying Network Diagram view.	96
Resetting the view	100
PART 2: MANAGING RESOURCES	101
CHAPTER 7: Creating Resources	103
Resources: People, Places, and Things.	103
Becoming Resource-Full	104
Understanding resources.	104
Resource types: Work, material, and cost	105
How resources affect task timing	105
Estimating resource requirements	107
The Birth of a Resource	107
Creating one resource at a time	108
Identifying resources before you know their names	109
Many hands make light work.	110
Managing Resource Availability.	111
Estimating and setting availability.	112
When a resource comes and goes	113
Sharing Resources.	114
Skimming from resource pools	114
Importing resources from Outlook.	116
CHAPTER 8: Working with Calendars	119
Mastering Base, Project, Resource, and Task Calendars.	120
Setting the base calendar for a project	120
Understanding the four calendar types	120
How calendars work	121
How one calendar relates to another.	121
Scheduling with Calendar Options and Working Times.	122
Setting calendar options.	123
Setting exceptions to working times.	124
Working with Task Calendars and Resource Calendars.	126
Setting resource calendars.	127
Making the change to a resource's calendar.	128
Creating a Custom Calendar Template	130
Sharing Copies of Calendars	132

CHAPTER 9: Assigning Resources	135
Finding the Right Resource	135
Needed: One good resource willing to work	136
Custom fields: It's a skill	137
Making a Useful Assignment	138
Determining material and cost-resource units	138
Making assignments	139
Shaping the contour that's right for you	142
Benefitting from a Helpful Planner	144
CHAPTER 10: Determining a Project's Cost	147
How Do Costs Accrue?	148
Adding up the costs	148
When will this hit the bottom line?	149
Specifying Cost Information in the Project	150
You can't avoid fixed costs	150
Entering hourly, overtime, and cost-per-use rates	152
Assigning material resources	153
How Your Settings Affect Your Costs	155
PART 3: BEFORE YOU BASELINE	157
CHAPTER 11: Fine-Tuning Your Plan	159
Everything Filters to the Bottom Line	159
Setting predesigned filters	160
Putting AutoFilter to work	161
Creating do-it-yourself filters	163
Gathering Information in Groups	165
Applying predefined groups	166
Devising your own groups	166
Figuring Out What's Driving the Project	169
Inspecting tasks	169
Handling task warnings and suggestions	170
CHAPTER 12: Negotiating Project Constraints	173
It's about Time	174
Applying contingency reserve	174
Completing a task in less time	175
Getting What You Want for Less	178
The Resource Recourse	179
Checking resource availability	179
Deleting or modifying a resource assignment	180

	Beating overallocations with quick-and-dirty rescheduling	181
	Finding help	182
	Leveling resources	182
	Rescheduling the Project	186
CHAPTER 13:	Making the Project Look Good	187
	Looking Good!	188
	Formatting the Gantt Chart	188
	Formatting taskbars	188
	Zeroing in on critical issues	191
	Restyling the Gantt chart	192
	Formatting Task Boxes	193
	Adjusting the Layout	195
	Modifying Gridlines	197
	Recognizing When a Picture Can Say It All	199
	Creating a Custom Text Field	200
CHAPTER 14:	It All Begins with a Baseline	205
	All about Baselines	205
	Saving a baseline	206
	Saving more than one baseline	207
	Clearing and resetting a baseline	209
	In the Interim	210
	Saving an interim plan	211
	Clearing and resetting an interim plan	212
	PART 4: STAYING ON TRACK	213
CHAPTER 15:	On the Right Track	215
	Developing a Communications Management Plan	216
	Gathering data	216
	Applying a tracking method	217
	Using the tracking tools	218
	For everything, there's a view	219
	Tracking Work for the Record	220
	Specifying the status date	221
	Remaining on track	222
	Determining the percent complete	222
	Recording start and finish information	223
	Knowing what to do when John works three hours and Mary works ten	224
	Uh-oh — we're in overtime	226

	Specifying remaining durations for auto-scheduled tasks	227
	Entering fixed-cost updates	228
	Moving a Task	229
	Update Project: Sweeping Changes	230
	Tracking Materials	232
	Tracking More Than One: Consolidated Projects	233
	Consolidating projects	233
	Updating consolidated projects	235
CHAPTER 16:	Project Views: Observing Progress	237
	Seeing Where Tasks Stand	238
	Baseline versus actual progress	238
	Lines of progress	238
	Delving into the Detail	241
	Tracking Progress Using Earned Value Management	244
	Calculating Behind the Scenes	246
	Earned-value options	246
	An abundance of critical paths	247
CHAPTER 17:	You're Behind — Now What?	249
	Using Project with Risk and Issue Logs	250
	Printing interim plans and baselines	250
	Printing task notes	251
	What-If Scenarios	253
	Sorting tasks	253
	Filtering	254
	Examining the critical path	255
	Using resource leveling (again)	257
	Determining which factors are driving the timing of a task	258
	How Adding People or Time Affects the Project	259
	Hurrying up and making modifications	259
	Throwing resources at the problem	259
	Shifting dependencies and task timing	261
	When All Else Fails	262
	Taking the time you need	263
	Finding ways to cut corners	263
CHAPTER 18:	Spreading the News: Reporting	265
	Generating Standard Reports	266
	What's available	266
	Overviewing the dashboard reports	267

Creating New Reports	268
Gaining a new perspective on data with visual reports	270
Creating a visual report	270
Fine-Tuning a Report.	271
Dragging, dropping, and sizing	272
Looking good!.	273
Spiffing Things Up	274
Call the Printer!	277
Working with Page Setup	277
Getting a preview.	282
Printing, at last!	283
Working on the Timeline	283
Adding tasks to the Timeline	284
Customizing the Timeline.	285
Copying the Timeline	286
CHAPTER 19: Getting Better All the Time	287
Reviewing the Project	288
Learning from your mistakes.	288
Debriefing the team	290
Comparing Versions of a Project.	291
Building on Success.	293
Creating a template.	293
Mastering the Organizer.	294
PART 5: THE PART OF TENS.	297
CHAPTER 20: Ten Golden Rules of Project Management	299
Roll with It.	299
Put Your Ducks in a Row.	300
Expect the Unexpected.	301
Don't Put Off until Tomorrow	302
Delegate, Delegate, Delegate.	302
Document It	303
Keep the Team in the Loop	303
Measure Success	304
Maintain a Flexible Strategy.	305
Learn from Your Mistakes	305
CHAPTER 21: Ten Cool Shortcuts in Project 2019	307
Task Information	307
Resource Information.	308
Frequently Used Functions	309

Subtasks	310
Quick Selections	310
Fill Down	310
Navigation	310
Hours to Years	311
Timeline Shortcuts	311
Quick Undo and Repeat	312
APPENDIX: GLOSSARY	313
INDEX	321

Introduction

Over the years, project management has evolved from a discipline that began with index cards and yarn to one that now uses sophisticated analyses, techniques, projections, reporting, and time and money tracking. Project management software brings functionality to project management that makes planning and tracking the complex projects we undertake a little more manageable.

About This Book

Microsoft Office Project 2019, the most recent incarnation of the world's most popular project management software, offers a tremendous wealth of functionality to users. In the beginning, however, as with most software, mastering it can seem like a daunting process. It helps to understand how Project's features relate to what you do every day as a project manager.

In *Project 2019 For Dummies*, my goal is to help you explore Project 2019, providing information on relevant project management concepts while also offering specific procedures to build and track a Project schedule.

Here are some broad topics that I help you explore in this book. You can:

- » Start out in Project 2019 by entering tasks and dependencies, estimating durations, and working with views
- » Work with resources, calendars, and costs
- » Negotiate constraints, fine-tune the schedule, and set a baseline
- » Gather data, analyze progress, take corrective actions, and report project status

Throughout this book, I offer advice on how to make all these features and procedures mesh with what you already know as a project manager to ease the transition to using Project 2019. Within this book, you may note that some web addresses break across two lines of text. If you're reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it's noted in the text, pretending as though the line break doesn't exist. If you're reading this as an e-book, you've got it easy — just click the web address to be taken directly to the web page.

Finally, Microsoft Office only runs on Windows 10 (as of this printing), and not Windows 7 or 8.1, so you'll need to have Windows 10 in order to run Project 2019. This book is written as if you're using the “stand-alone” or “one-time-purchase” version of Microsoft Project. If you have an Office 365 subscription, you may already be familiar with Project 2019 features, because they're added to previous versions of Project biannually. Because this book assumes stand-alone software, I don't spend time on project management service features; the Roadmap service; or anything associated with enterprise versions, server features, or cloud functionality. But the good news is, regardless of whether you're running the stand-alone or subscription version of the software, this book is packed full of useful information for getting to know Project 2019.

Foolish Assumptions

I've made some assumptions about you, gentle reader. I figure that you're computer-literate and that you know how to use the mouse, the keyboard, and the Ribbon. I assume that you know how to use most common Windows functions (such as the Clipboard), as well as many basic software functions, such as selecting text and dragging and dropping items with the mouse.

I also assume that you have experience in managing projects. Whether you manage very large projects that are several years long or you have been a team lead on a project, the information in this book is more accessible if you have a background in project management.

I do *not* assume that you've used Project or any other project management software. If you're new to Project, you'll find what you need to get up to speed, including information on how Project works, finding your way around the Project interface, and building your first Project plan. If you've used an earlier version of Project, you'll find out about Project 2019 and the features it provides.

Icons Used in This Book

One picture is worth . . . well, you know. That's why *For Dummies* books use icons to provide visual clues to what's going on. Essentially, icons call your attention to bits of special information that may well make your life easier. The following icons are used in this book.



REMEMBER

The Remember icon signals either a pertinent fact that relates to what you're reading at the time (but is also mentioned elsewhere in the book) or a reiteration of a particularly important piece of information that's, well, worth repeating.



TIP

Tips are the advice columns of computer books: They offer sage advice, a bit more information about topics under discussion that may be of interest, or ways to do things a bit more efficiently.



WARNING

Warning icons spell trouble with a capital *T*: When you see a warning, read it. If you're not careful, you might do something at this point that could cause disaster.

Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that includes tips on creating your project schedule, shortcut keys, and helpful websites to hone your expertise. To get this Cheat Sheet, simply go to www.dummies.com and type **Project 2019 For Dummies Cheat Sheet** in the Search box.

Where to Go from Here

Take what you've learned in the project management school of hard knocks and jump into the world of Project 2019. When you do, you'll be rewarded with a wealth of tools and information that help you manage your projects much more efficiently.

Your first step might be to read the table of contents and find the sections of this book that you need — or simply turn to Chapter 1 and start reading.

1

Getting Started with Project 2019

IN THIS PART . . .

Get familiar with the Ribbons and its tabs in Project 2019.

See how to open a new project, enter tasks, and organize a project.

Become skilled in working with summary tasks, milestones, and notes.

Identify and arrange task dependencies to create a network diagram.

Develop duration estimates for tasks.

Customize Project views to meet your needs.

IN THIS CHAPTER

- » Understanding the elements of a project
- » Laying out the project manager's role
- » Benefitting from Project 2019
- » Exploring the software interface
- » Finding help in Project

Chapter **1**

Project Management, Project 2019, and You

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.

Everything you used to do with handwritten to-do lists, sticky notes, 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 2019 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 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 an individual 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. Fortunately, risks can also present opportunities to accelerate the schedule or come in under budget.
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 leadership skills to manage the completion of tasks and keep the schedule on track.



TIP

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.

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.



TIP

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 tasks, duration, and 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 physical resources such as materials and equipment.
- » **Cost:** Estimate project costs and apply those estimates across the schedule to create a time-phased budget.
- » **Communication:** Notify appropriate *stakeholders* (everyone who has a legitimate stake in its success) of the project status.

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 2019 can help.

Introducing Project 2019

Project 2019, which is a scheduling tool, helps you organize, manage, and control defined variables, as identified in the preceding section. Project can also help you manage the undefined variables as well. In this book, 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 model*. It's a model because it models what you think will happen given what you know at the time. However, for ease of reference, I just refer to it as a schedule. The schedule has a plethora of data about various aspects of your project as well as graphical representations of that information.



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 2019, you see several options for starting a new project, as shown in Figure 1-1.

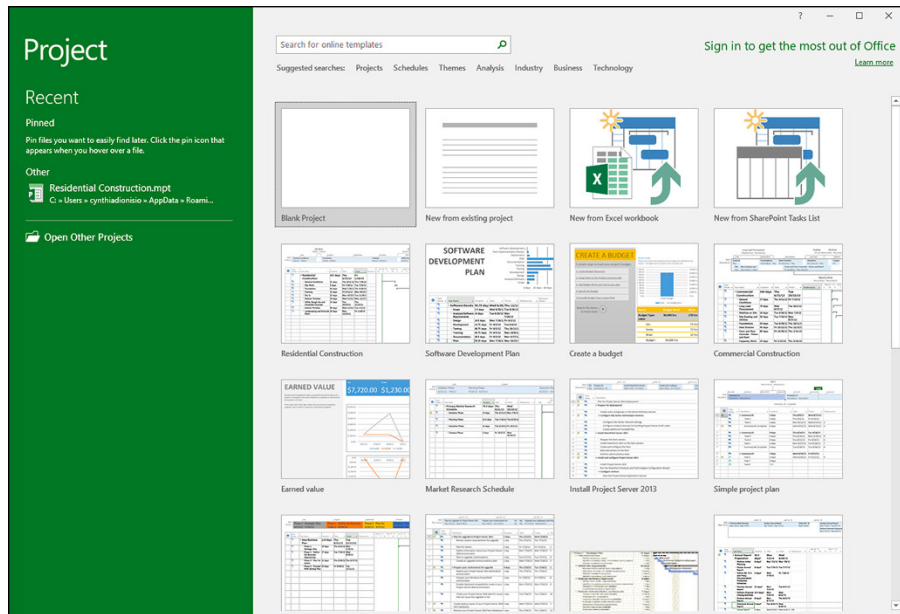


FIGURE 1-1:
What you see
when you open
Project 2019.

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:

- » Residential construction
- » Software development
- » New product launch
- » Merger or acquisition evaluation

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 Ribbon tabs, the Ribbon, the Timeline, a pane with a sheet and a chart, and the status bar, as shown in Figure 1-2.

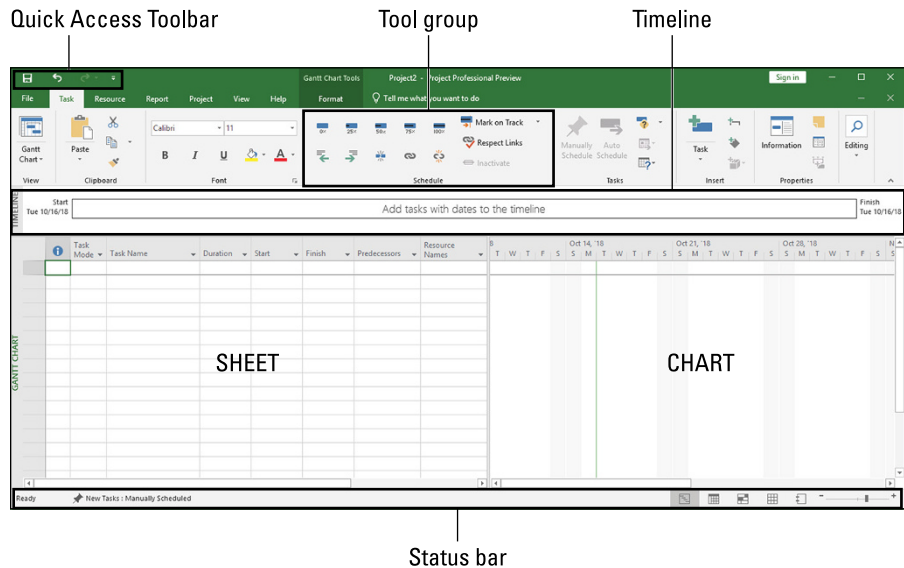


FIGURE 1-2:
A blank project.

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.
- » **Ribbon tab:** The Ribbon 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.
- » **Ribbon:** The Ribbon provides 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 tab of the Ribbon.
- » **Timeline:** The Timeline provides an overview of the entire project — a graphical view of the project from start to finish. You have the option of showing the Timeline or hiding it.
- » **Sheet:** Similar to a spreadsheet, the sheet displays the data in the project. The default fields change depending on the Ribbon 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 Ribbon 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 and zoom level on the right, and information on how newly entered tasks are scheduled on the left.

Navigating Ribbon tabs and the Ribbon

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

Each Ribbon tab has a different group of controls or functions. You can navigate from one tab to another by clicking on the tab name.

The first tab on the left is the File Ribbon tab. After you click this tab, you see the Navigation plan down the left side, as shown in Figure 1-3.

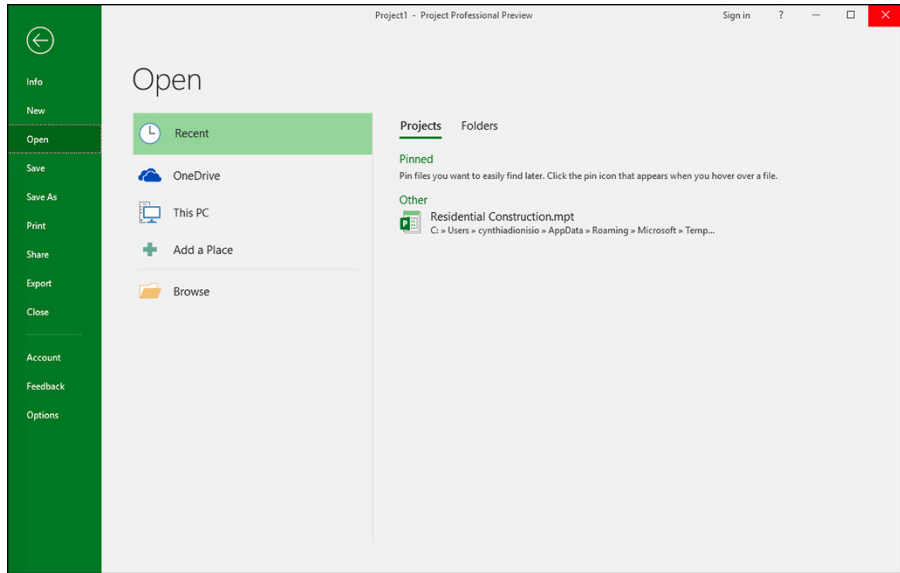


FIGURE 1-3:
The File Ribbon
tab menu.

The Ribbon tab puts you into 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 click Options and customize the Ribbon and the Quick Access toolbar.

The Task Ribbon 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 Ribbon tab is the View. The default view is Gantt Chart view. It shows the task information and the chart that displays a bar chart representing the duration of each task.

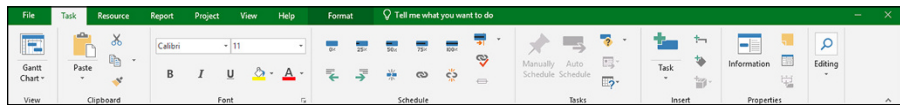


FIGURE 1-4:
The Task
Ribbon tab.

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

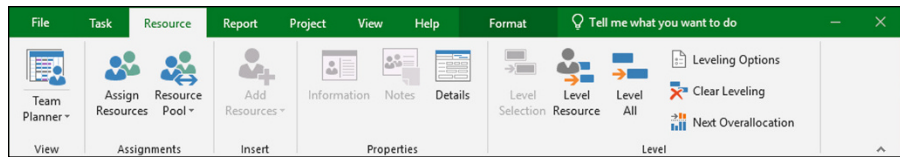
Calendar	Network Diagram
Resource Sheet	Resource Usage
Resource Form	Resource Graph

Task Usage	Task Form
Task Sheet	Team Planner
Timeline	Tracking Gantt

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

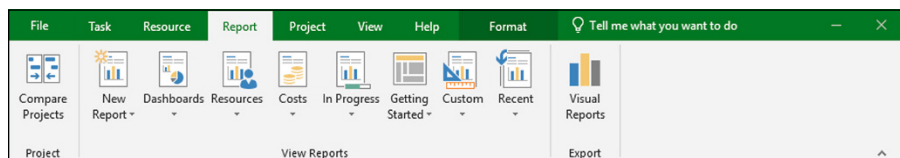
The Resource Ribbon tab, shown in Figure 1-5, helps you organize resources, such as assigning and leveling resources across tasks. In Project, resources include people, equipment, material, locations, and supplies. You can assign costs and calendars to resources. (I talk more about resources in Chapter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

FIGURE 1-5:
The Resource
Ribbon tab.



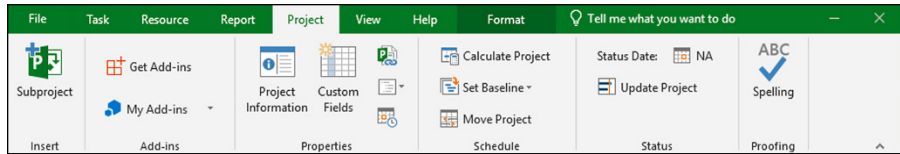
The Report Ribbon tab, shown in Figure 1-6, is where you can create reports on resources, costs, or progress, or put them all together in a dashboard report. You can create a report that compares your current status to previous versions of your project. I tell you all about reports, including how to customize and export your reports, in Chapter 18.

FIGURE 1-6:
The Report
Ribbon tab.



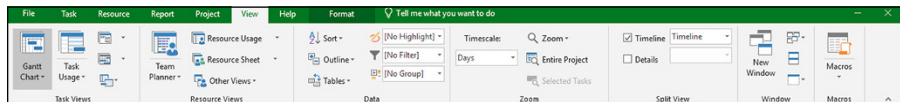
On the Project Ribbon tab, shown in Figure 1-7, you find commands to help you manage your project as a whole, rather than by task or resource. For example, you can enter or change the project start and finish dates and the baseline. If you need to change working time or add a subproject, this is the place to do it.

FIGURE 1-7:
The Project Ribbon tab.



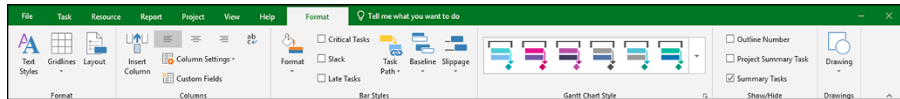
The View Ribbon tab, shown in Figure 1-8, lets you see some standard views. Examples are Task views, such as Gantt Chart, and Resource views, such as Resource Usage or Team Planner. You can use the View Ribbon tab to look at information sorted by date or a specific period. This tab also lets you see the entire project, show or hide the Timeline, and set the timescale you see.

FIGURE 1-8:
The View Ribbon tab.



The Format Ribbon tab, shown in Figure 1-9, has commands that help you present your schedule, such as text styles, Gantt chart styles, and column settings.

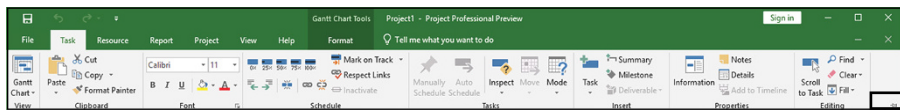
FIGURE 1-9:
The Format Ribbon tab.



TIP

You can either show or 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 (as shown in Figure 1-10). The upward-facing arrow (Λ) on the far-right side hides the Ribbon. If your Ribbon is closed, click on any tab, look in the lower-right corner of the Ribbon and you will see a pushpin. Click on the pushpin to keep your Ribbon open. You can also press Ctrl+F1 to show or hide the Ribbon.

FIGURE 1-10:
Keeping your Ribbon visible.



Pin the ribbon