

TOPIC B

Navigate in the Microsoft Project Desktop Environment

Now that you have reviewed some basic information about project management, you can start to work with Microsoft Project. If you are new to it, a good first step is to launch the application and explore its functions before you begin using it to develop live project plans. In this topic, you will navigate the Microsoft Project On-Premise interface to become familiar with the program's basic features.

Microsoft Project

Microsoft Project is a powerful project management program that enables you to create, present, manipulate, manage, and analyze project plans. Project's extensive features give you control over a project's schedule, tasks, and resources. This detailed management of a project will help you ensure that your projects are successful and make the best uses of time and resources.

Microsoft released the first version of Project in 1985. The software has been upgraded several times, and the latest version is called Microsoft Project 2019. Project 2019 is part of the Microsoft Office family of software applications. It and its prior versions have not been included in any of the Office suites; it must be acquired separately. Project 2019 runs only on the Windows® 10 operating system.

Procurement Methods

Microsoft Project can be procured in two ways. It can be purchased or used without charge on a trial basis, and it will be downloaded and reside on a user's computer. Microsoft calls this the On-Premise solution, but it is more often referred to as the desktop version or desktop client. Updates from Microsoft will be downloaded and configured automatically as a component of the Windows Update process. Because the majority of users work in the desktop environment, this course will focus on it.

Alternatively, Project can be "rented" on a subscription basis with an Office 365™ license, and in this case it will reside in the cloud. Microsoft refers to this as the Cloud-based solution, but it is more often referred to as the online version. Updates will be automatically installed as they are released, so the user always has access to the most recent changes to the software. The Project environment is accessed from a web browser and requires only user credentials.

Project Editions

Each procurement method offers more than one edition of the software, as shown in the following table.

<i>Procurement Method</i>	<i>Edition</i>	<i>Features</i>
On-Premise	Project Standard	<ul style="list-style-type: none"> Fully installed, up-to-date desktop application One license covers one computer Manage tasks, reports, and business intelligence

Procurement Method	Edition	Features
Cloud-based	Project Professional	Project Standard features, plus: <ul style="list-style-type: none"> • Collaborate using Microsoft Teams software • Manage resources • Sync with Project Online and Project Server
	Project Server	Project Professional features, plus: <ul style="list-style-type: none"> • Project portfolio management
	Project Online Essentials	<ul style="list-style-type: none"> • Team members can update task status, share documents, and communicate on projects • Submit timesheets to capture project and non-project time • Does not include the Project desktop application
	Project Online Professional	Project Online Essentials features, plus: <ul style="list-style-type: none"> • Fully installed, up-to-date Project desktop application • One license covers up to five computers per subscriber • Use scheduling tools like Gantt charts and built-in customizable templates • Save projects to the cloud for ease of access and seamless collaboration with your team • Assign resources to project tasks
	Project Online Premium	Project Online Professional features, plus: <ul style="list-style-type: none"> • Use advanced analytics to choose project proposals that best align with strategic goals and honor constraints • Ensure optimal allocation of resources across projects • Use out-of-the-box portfolio reports to gain portfolio performance insights



Note: This course was developed using the desktop environment procured via Project Online Professional subscription.



Note: Appendix A contains more information about the online environment and how to access it.

The Start Screen

The **Start** screen is the first screen you see when you open the Desktop edition of Microsoft Project. The **Start** screen contains multiple options to help you get started with using Project.

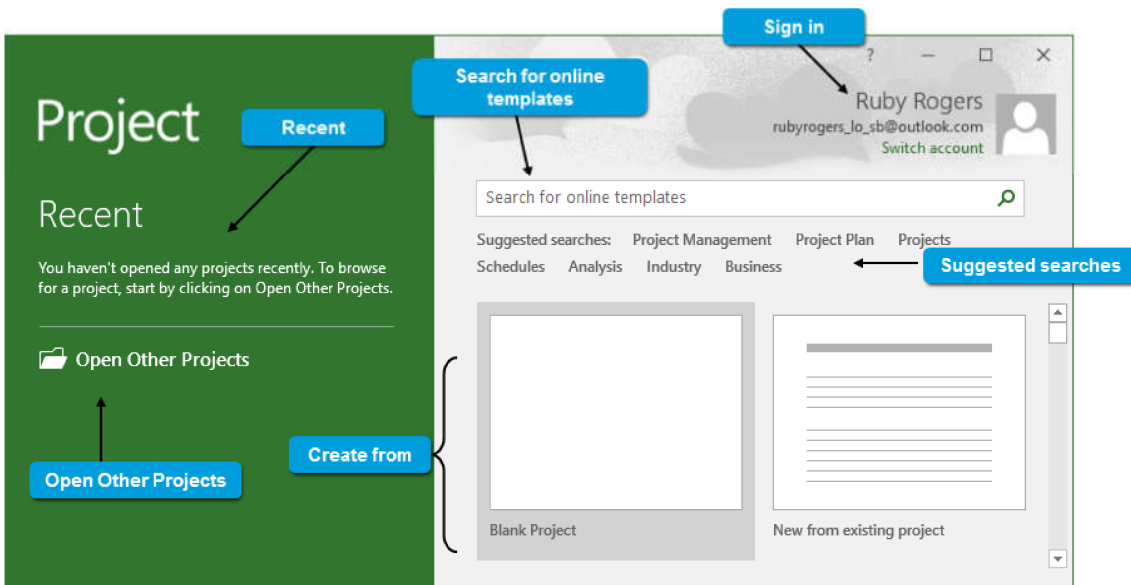


Figure 1–2: The Start screen provides a launching point for opening or creating projects.

From this screen you can use the following commands.

Command	Description
Recent	Select the name of a recent Project file to open it.
Open Other Projects	Open other Project files that are not on the Recent list.
Search for online templates	Search online for Project templates that you can use to start a new Project file.
Suggested searches	Use suggested keywords to browse Project templates.
Create from	Choose to create a new blank Project file, a new project from an existing file, or a new project from a template.
Sign in	Log in to your Microsoft account.




Note: You may already have a personal or organizational Microsoft account. Examples of personal Microsoft accounts include Office 365, Skype®, OneDrive®, Xbox Live®, and Outlook.com. If you don't have a Microsoft account, you can create one for free at <http://signup.live.com>.

Microsoft Project Views

Microsoft Project uses **views** to display information on the screen from the currently open project plan file. Project has a total of 36 different views. You can use many of the views on the **View** tab to focus on specific aspects of your project. Most views are separated into two panes—with the **Sheet** pane on the left and the **Chart** pane on the right.

The most common views include the following.

View Type	Used To
Calendar	Create, edit, show, or review tasks scheduled on specific days, weeks, or months in a calendar.

View Type	Used To
Gantt Chart	View tasks and associated information in a sheet, and observe tasks and duration over time in a bar graph on a timescale. You can also use this view type to enter and schedule a list of tasks. This view appears by default in Project.
Network Diagram	Enter, edit, and review all tasks and task dependencies in a project. You can also use this view type to create and fine-tune your schedule in a flowchart format.
Task Usage	Review, enter, and edit assignments by task. The sheet portion of the view has tasks listed with their assigned resources, and the timesheet portion contains information about the tasks such as work or costs according to the timescale.
Timeline	Display a snapshot of key project tasks and milestones that you can easily share in PowerPoint®, Word, Outlook®, and other Microsoft Office applications. Only those items you choose will be displayed in the Timeline.
Tracking Gantt	Compare the baseline schedule with the actual schedule while implementing a project. In this view, you can view the tasks and task information in a sheet, and a chart showing a baseline and scheduled Gantt bars for each task.
Resource Sheet	Enter, edit, and review resource information in a spreadsheet format.
Resource Usage	Review, enter, and edit assignments by resource. The sheet portion of the view contains a list of resources with associated task assignments, and the timesheet portion details the costs or work for the resources on a timescale.
Team Planner	Manage resource allocation in the resource list format. In this view, you can view unscheduled tasks by resource and also view all unassigned tasks. This allows you to quickly edit all resource assignments in one view.
	<div style="border: 1px solid black; padding: 5px;">  <p>Note: The Team Planner view is not available in Microsoft Project Standard.</p> </div>

More Views

Besides the commonly used views, Project provides other options for viewing project information with the help of the **More Views** dialog box. Using **More Views**, you can observe relationships across variables such as cost, work, and resources in views such as **Relationship Diagram**, **Detail Gantt**, **Descriptive Network Diagram**, and **Resource Allocation**. The **More Views** dialog box can be accessed in a number of ways on the **View** tab by selecting the drop-down arrow on any of the view options. You can also access it by right-clicking the left edge of any view and selecting **More Views**.

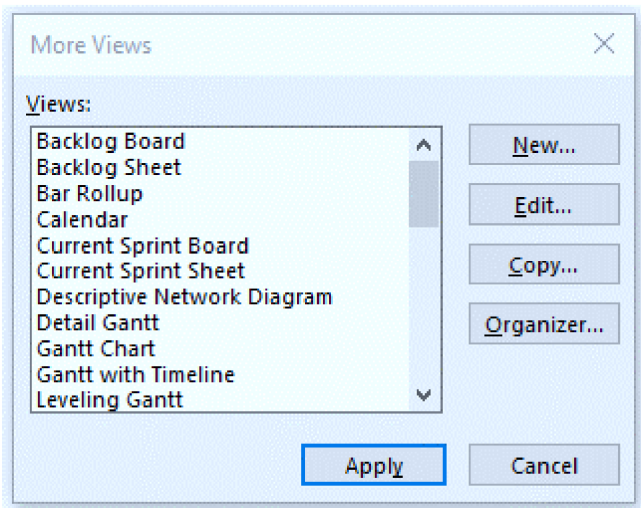


Figure 1-3: The More Views dialog box shows all of the views in Project.

The Gantt Chart View

The *Gantt Chart* is the default view in Microsoft Project. When you first open a blank project, Project displays this view. Gantt charts are the most common method for displaying project information.

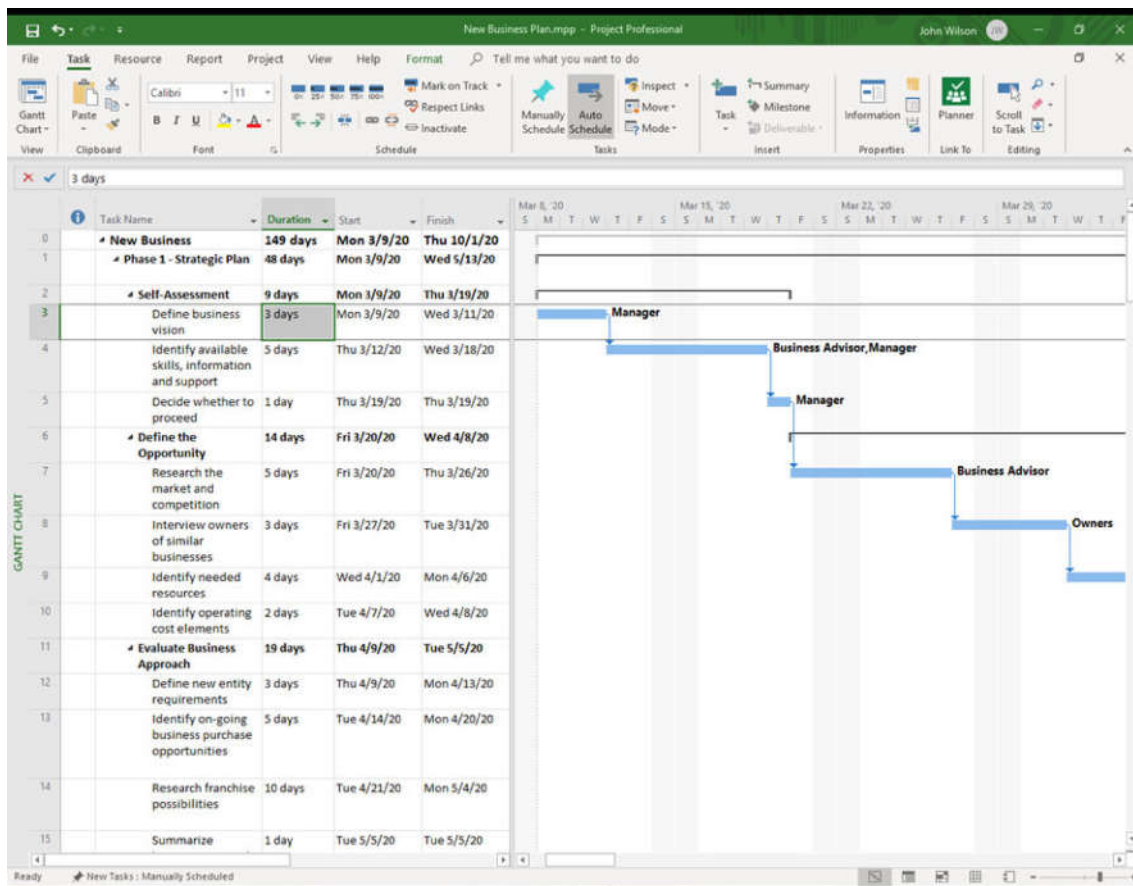


Figure 1-4: The Gantt Chart view is where you will spend most of your time working with a project plan.

The left pane of the Gantt chart (also called the **Task Entry** table) displays a table of the tasks in the project plan. The right pane displays the duration of each task plotted as a bar against the dates along the top of the pane.



Note: The Gantt chart is named after Henry Gantt, who designed this tool between 1910 and 1915. Although now regarded as a common charting technique, Gantt charts were considered revolutionary when first produced.

Timescales

A *timescale* is the range of time within which work has elapsed. In Microsoft Project, the timescale is the time period indicator that appears at the top of the time-phased portion of various project views. In a project, the timescale helps you identify and define the period during which a task is to be completed or a resource is available.

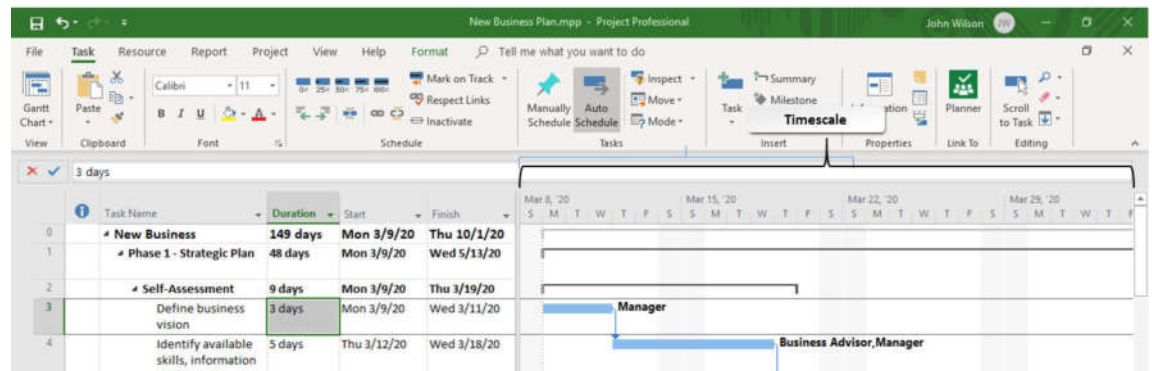


Figure 1-5: The timescale in a Gantt chart.



Note: The timescale appears in various project views, including **Gantt Chart**, **Task Usage**, and **Resource Usage**.

Tables

Tables control the kind of information you want to present about tasks, resources, and assignments as a set of fields in a view. By choosing a table from the **Data** group on the **View** tab, you can display various tables and control the columns that appear in the table. You can also access tables by right-clicking the **Table Command Selection Box** box, which is located above the task numbers. Tables display your project data in a horizontal row format, with each task (or resource or assignment) and its related information appearing in a single row. The intersection of a column and a row is called a cell. Cells contain the individual pieces of data in the table.

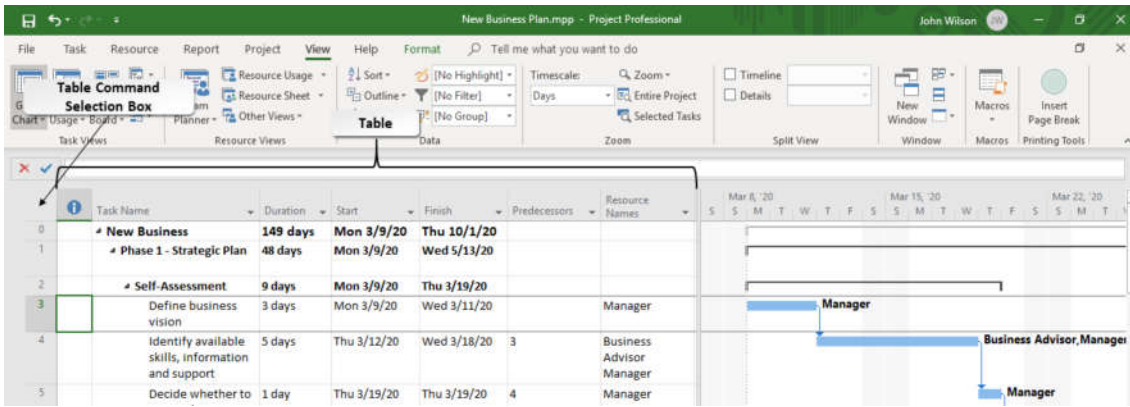


Figure 1-6: The Task Entry table in the Gantt Chart view.

Fields

A field is a location in a sheet, form, or chart that contains specific information about a task, a resource, or an assignment. It may be a part of a table, a part of a form view, or a timephased area of a usage view. Each column in a table is a separate field. For example, the **Task Entry** table, displayed in the **Gantt Chart** view, displays the **Task Name**, **Duration**, **Start**, **Finish**, **Predecessors**, and **Resource Names** fields for each task within your project.

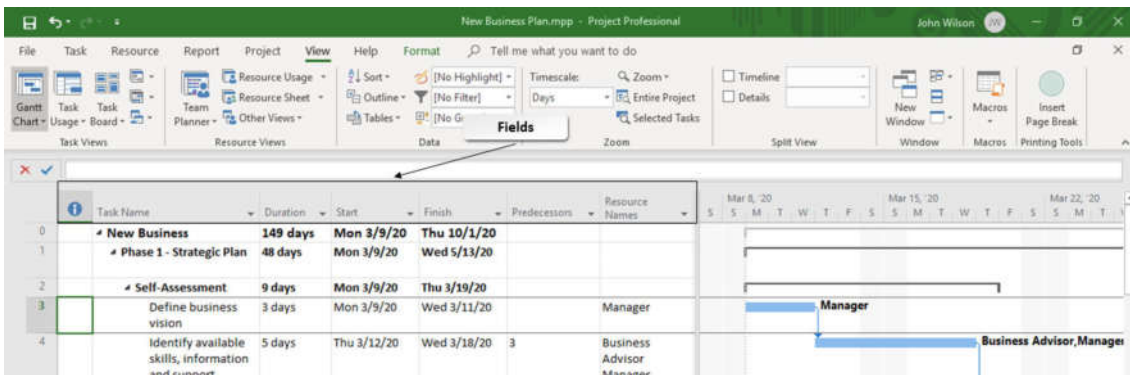


Figure 1-7: The fields in a Gantt chart.

The Quick Access Toolbar

In the top-left corner of the window you will see the **Quick Access Toolbar**. As its name implies, the toolbar enables you to rapidly perform those Microsoft Project commands that you use most often—such as **Save**, **Undo**, and **Redo**.

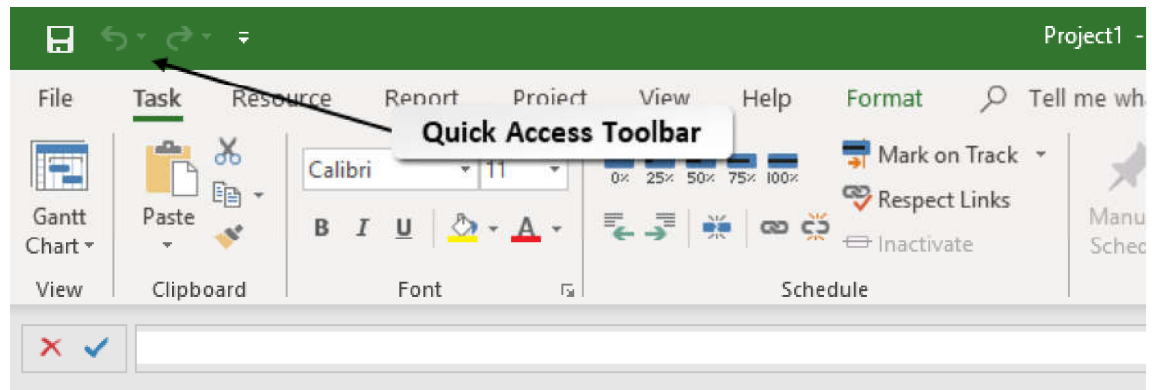


Figure 1-8: The Quick Access Toolbar.

The **Quick Access Toolbar** is highly customizable, and is always available on the screen.

The Ribbon

The **ribbon** at the top of the window is where you will find most of the controls used in Microsoft Project. The controls are grouped into seven basic tabs:

- **File**
- **Task**
- **Resource**
- **Report**
- **Project**
- **View**
- **Help**

When you select a tab, the controls related to that tab are displayed on the ribbon. A different default view button will be shown on the far left of the ribbon for each tab. For example, the **Gantt Chart** view button is the default for the **Task** tab, and the **Team Planner** view button is the default for the **Resource** tab.

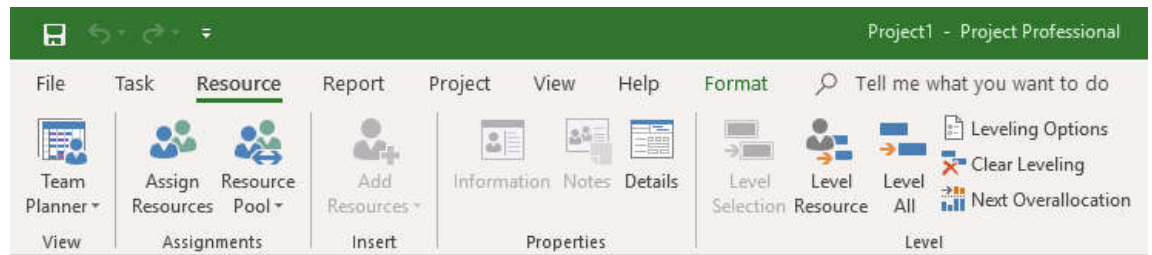


Figure 1-9: The ribbon groups the most common commands into tabs by type.



Note: This course uses a streamlined notation for ribbon commands. They'll appear as "[Ribbon Tab]→[Button or Control]" as in "Select **Task**→**Paste**." If the group name isn't needed for navigation or there isn't a group, it's omitted, as in "Select **File**→**Open**." For selections that open menus and submenus, this notation convention will continue until you are directed to select the final command or option, as in "Select **Task**→**Editing**→**Clear**→**Clear All**."

Contextual Tabs

In addition to the seven basic tabs, the ribbon also contains a **Format contextual tab**. The contents of this tab change depending on what is selected in the view. When you select this tab, you will see all of the tools related to the currently selected pane or object in one place on the ribbon. For example, when you work in **Gantt Chart** view, the ribbon displays formatting options for the **Gantt Chart**. If you switch to **Resource Sheet** view, the ribbon will display the formatting options for the **Resource Sheet**. The commands and options on the **Format** tab change the most from view to view, while the other tabs show dimmed (unavailable) commands if they cannot be used in the current view.

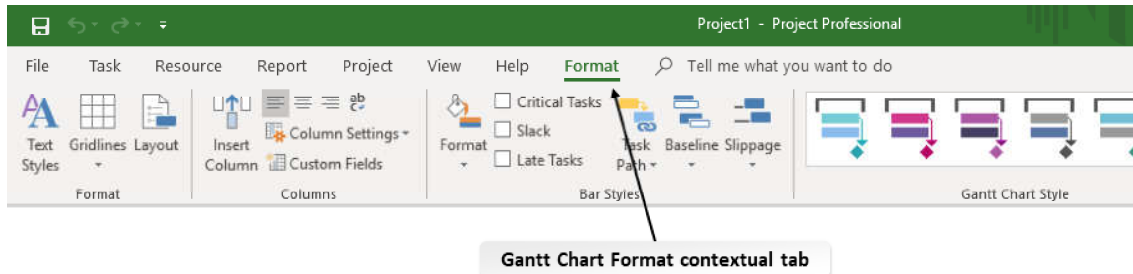


Figure 1-10: The contextual tab adapts to what you are doing in the View area.

The Status Bar

The **status bar** at the bottom of the window shows you some of the current program settings. It also displays shortcuts to the most commonly used views. Finally, it contains the **Zoom** control, which enables you to expand or contract the timescale shown in the view.

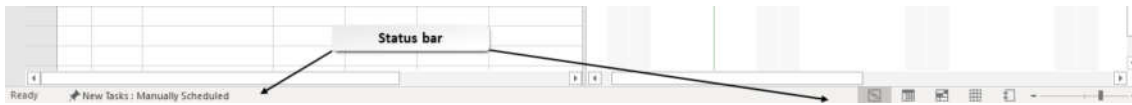


Figure 1-11: The status bar shows you current program status and enables you to quickly change views and zoom levels.

The Tell Me Feature

Type into the **Tell Me feature** text box to quickly access commands just like a search command. The most commonly used commands and tasks are shown at the top of the results list.

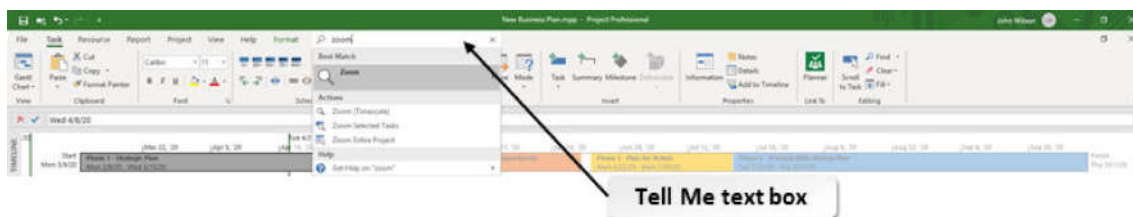


Figure 1-12: The Tell Me feature is designed to help you find commands quickly.

The Backstage View

The **File** tab displays differently than the other tabs. When you select it, you will see the **Backstage View**, where you can access a number of file and program controls. The **Backstage View** provides

a central location for commands used to take action on a project as a whole, such as creating a file, saving a file, and preparing to print.



Figure 1–13: The Backstage View enables you to work with Project files and application settings.

The Save As Screen

You can save a new Microsoft Project file by selecting the **File** tab on the ribbon and then selecting the **Save As** tab in the **Backstage View**. You have the option of saving your Project file in three different places.

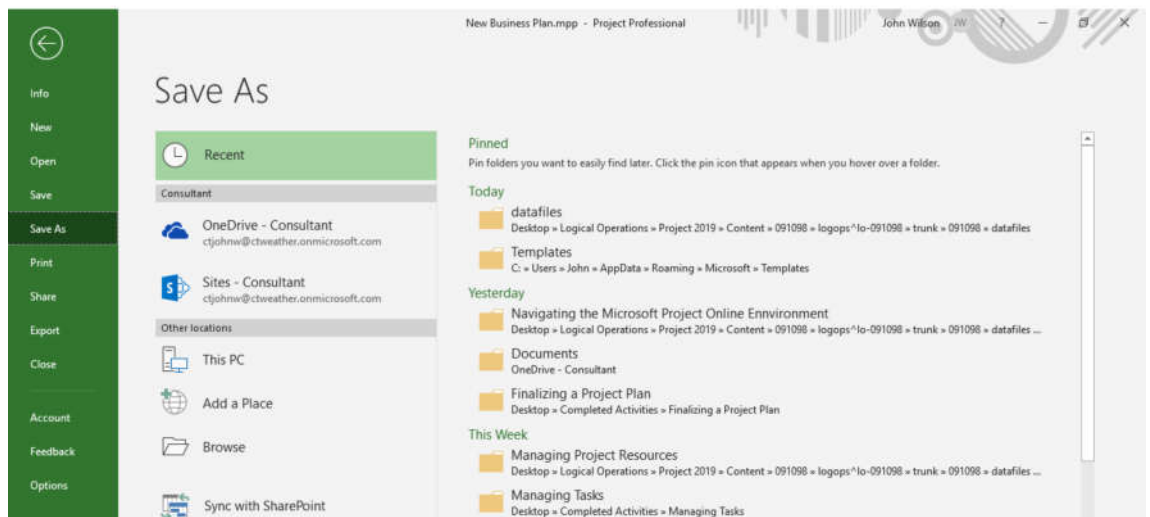


Figure 1–14: You can choose where to save a project plan on the Save As screen.

Place	Description
Sync with SharePoint	This option saves and syncs your Project file on a SharePoint® site. This is a good option to use if you created the project file from a SharePoint task list and your project team is utilizing SharePoint.
OneDrive	This option saves your Project file in the cloud. This is a good option to use if you need to access your Project file from more than one computer. It also means you can retrieve your Project file if your computer is damaged, lost, or stolen.
This PC	This option saves your Project file to your computer or network.



Note: If you save your Project files to OneDrive, be aware that you must have Microsoft Project installed on any computer you plan to use to access the file. For example, if you plan to access a Project file using your work computer and your home computer, both computers must have Microsoft Project.

File Formats

The standard file format for a project plan is the .mpp file, which stands for Microsoft Project Plan. Although Project can open .mpp files from all previous versions of Microsoft Project, people using earlier versions of Project will not be able to open the latest Project version .mpp files. You can save your project plan in earlier file formats (also referred to as legacy formats). You can choose from the available file formats in the **Save As** dialog box.

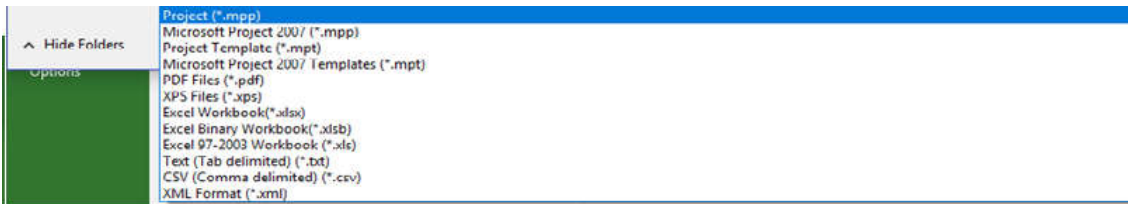


Figure 1-15: Use the *Save As* dialog box to select an alternate file format.

ACTIVITY 1–2

Navigating in the Project Desktop Environment

Data File

C:\091098Data\Getting Started with Microsoft Project\New Business Plan.mpp

Before You Begin

Microsoft Project is installed on your computer and activated.


Scenario

You are a new project manager for Greene City National Bank, and you have been assigned your first project. Your manager suggests that you familiarize yourself with the Project application before the project kickoff meeting, and she has made available a sample project plan for you to look at.



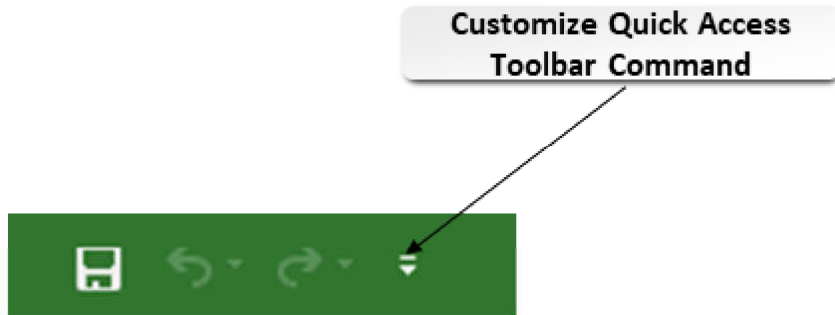
Note: Detailed steps of activities are likely to vary as Microsoft issues digital updates.

1. Open Microsoft Project.
 - a) Start Project from either the **Start** menu or the desktop shortcut.
 - b) Verify that Microsoft Project opens.
2. Open the **New Business Plan.mpp** project plan file.
 - a) In **Backstage View**, scroll down and select **Open Other Projects**.
 - b) In the **Open** dialog box, navigate to the **C:\091098Data\Getting Started with Microsoft Project** folder containing your class files.
 - c) Select **New Business Plan.mpp** and select **Open**.
Verify that the project opens in the **Gantt Chart** view.
3. Explore the ribbon.
 - a) On the ribbon, select the **View** tab. Move the cursor over each button in the **Resource Views** group to reveal and read a ScreenTip that explains the button's function.
 - b) Select the **Resource Sheet** button.
Verify that **Resource Sheet** appears on the left edge of the screen, and that the screen shows information about each resource in the project.
 - c) Select the **Resource Sheet Format** tab.
Verify that the ribbon displays tools that can be used to modify the **Resource Sheet**.
 - d) Right-click the left edge of the screen, and select **Gantt Chart** to change the view.
4. Zoom the timescale to the entire project so you do not need to scroll to the right to see the entire project.
 - a) In the **Tell Me** text box, type *zoom*
 - b) In the results list, select **Zoom Entire Project**.
Verify that the timescale for the entire project fits the width of the Gantt chart's right pane.
5. View the **Calendar** view to see the tasks that are scheduled for a specific week.
 - a) On the ribbon, select the **View** tab.

- b) From the **Task Views** group, select **Calendar**. 
- c) Select the **Week** button at the top of the calendar.
- d) Scroll down using the right scroll button until a yellow square appears next to the week of March 15 in the calendar.
Verify that the weekly calendar shows the tasks that are scheduled for the week of March 15.

6. Add the **Scroll to Task** command to the **Quick Access Toolbar**.

- a) On the right side of the **Quick Access Toolbar**, select **Customize Quick Access Toolbar→More Commands**.



- b) In the left pane, select **Scroll to Task**.
- c) Select **Add**.
- d) Select **OK**.
Verify that **Scroll to Task** appears on the **Quick Access Toolbar**.



7. Close Microsoft Project without saving the file.

- a) In the top-right corner of the **Project** window, select the **Close** button.
- b) In the **Microsoft Project** dialog box, select **No** to discard the changes.
Verify that Project is closed.

Summary

In this lesson, you started using Microsoft Project. By reviewing the basics of project management and navigating the Project On-Premise interface, you laid the foundation for the knowledge and skills that will enable you to use Project effectively.

What is your next big project—either at work or at home?

How do you think Microsoft Project could help you with planning your project?



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