



INFOCUS COURSEWARE

Microsoft Project 2013

Module 2



Product Code: INF1371

ISBN: 978-1-921939-86-0

❖ General Description

Microsoft Project 2013 - Module 2 is designed for users of Microsoft Project who want to take their skills beyond creating simple projects. It is particularly suited to Microsoft Project users who work with multiple projects and have a need to produce elaborate and detailed reports.

❖ Learning Outcomes

At the completion of this course you should be able to:

- work more productively with project views
- work with tables in **Microsoft Project**
- work with some of the features that allow you to control your data
- format projects to make them more appealing and relevant
- print data from **Gantt Charts** in a variety of ways and presentations
- create and work with several types of custom fields
- create and work with **WBS Codes**
- create a custom view with a custom filter, group and table
- run and modify standard graphical reports as well as create your own custom reports
- create and work with visual reports
- work with and create project templates
- work with and understand **Microsoft Project** project files
- work with and link multiple projects in **Microsoft Project**
- create shared resources for use amongst multiple projects
- downsize large project files into more manageable entities
- export project data to other applications
- create **VBA** macros to automate operations in a project file

❖ Prerequisites

The skills and knowledge acquired in **Microsoft Project 2013 - Module 2** will build on the basic skills of creating a project, and include skills such as working with project files, project and file linking, printing and reporting, project downsizing, sharing resources, and using Project VBA to automate operations.

❖ Topic Sheets

180 topics

❖ Methodology

The InFocus series of publications have been written with one topic per page. Topic sheets either contain relevant reference information, or detailed step-by-step instructions designed on a real-world case study scenario. Publications can be used for instructor-led training, self-paced learning, or a combination of the two.

❖ Formats Available

A4 Black and White, A5 Black and White (quantity order only), A5 Full Colour (quantity order only), Electronic Licence.

❖ Companion Products

There are a number of complementary titles in the same series as this publication. Information about other relevant publications can be found on our website at www.watsoniapublishing.com.

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47 Greenaway Street
Bulleen VIC 3105
Australia
ABN 64 060 335 748

Phone: (+61) 3 9851 4000
Fax: (+61) 3 9851 4001
info@watsoniapublishing.com
www.watsoniapublishing.com

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Contents

Project Views

- Understanding Project Views
- Working With the Standard Views
- Creating Split Views
- Creating a Custom View
- Creating a Custom Combination View
- Using Custom Views
- Customising the View Menus
- Saving an Existing View
- Deleting Unwanted Views
- Keeping New Views Local

Tables

- Exploring Tables
- Creating a New Table
- Adding Fields Using Add New Column
- Adding Fields Using Insert Column
- Adding Simple Custom Fields
- Formatting Table Fields
- Creating a Simple Lookup Table
- Using a Custom Table
- Using a Hyperlink Field

Controlling Project Data

- Understanding the Data Tools
- Basic Data Highlighting
- Highlighting Date Ranges
- Highlighting a Range of Tasks
- Highlighting Tasks With Specific Resources
- More Highlight Filters
- Applying Filters
- Creating a Custom Filter
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- Editing Existing Filters
- Deleting an Unwanted Filter
- Grouping Tasks
- Using AutoFilters

Formatting Projects

- Understanding the Timescale
- Changing Time Periods
- Showing Tiers
- Modifying Specific Tiers
- Formatting for Non-Working Time
- Changing Text Styles
- Working With Gridlines
- Displaying Progress Lines
- Working With Progress Lines

- Changing the Layout
- Understanding Gantt Chart Bars
- Changing Gantt Chart Styles
- Changing Bar Text
- Formatting Selected Bars
- Changing Bar Styles

Printing Gantt Charts

- Placing Printing Commands on the Ribbon
- Using Print Preview
- Setting Page Breaks
- Printing Specific Dates and Pages
- Printing Headers
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- Working With the Legend
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Custom Fields

- Understanding Custom Fields
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- Creating a Formula in a Custom Field
- Modifying a Formula
- Testing a Formula
- Understanding Graphical Indicator Custom Fields
- Creating Graphical Indicator Custom Fields
- Creating a Lookup Custom Field
- Creating an Outline Code Mask
- Entering Lookup Table Values
- Using a Lookup Table

WBS Codes

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- Creating WBS Codes
- Altering Tasks With Custom WBS Codes
- Renumbering WBS Codes
- Editing Custom WBS Codes

Custom Views

- Preparing for the Custom View
- Creating a Custom Filter for the View
- Creating a Custom Group for the View
- Creating a Custom Table for the View
- Creating the Custom View

- Removing a Custom View and Its Components

Graphical Reports

- Understanding Graphical Reports
- How Graphical Reports Work
- Running a Report
- Formatting Chart Objects
- Manipulating Report Data
- Filtering Report Data
- Cloning an Existing Report
- Creating a New Report
- Enhancing Report Appearance
- Making Reports Global
- Removing Unwanted Reports

Visual Reports

- Understanding Visual Reports
- Understanding Excel Visual Reports
- Creating a Visual Report From a Template
- Choosing Fields to Display in a Visual Report
- Changing the X Axis Categories
- Filtering a Visual Report
- Formatting a Visual Report
- Saving a Visual Report as a Template
- Using a Custom Visual Report Template

Project Templates

- Understanding Project Templates
- Examining the Templates
- Saving a Project as a Template
- Using a Custom Project Template
- Specifying the Personal Templates Folder
- Using the Personal Template Folder
- Modifying a Template
- Understanding the Global Template
- Organising the Global Template
- Applying a Newly Organised Item
- Removing Items From the Global Template

Microsoft Project Files

- Opening a Project 2007 File
- Moving a Project's Start Date
- Working With Multiple Files
- Hiding Open Files



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Australia
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Linking and Combining Projects

- Understanding Linked Projects
- Combining Projects
- Viewing a Combined Project
- Printing From a Combined Project
- Setting a Combined Project Start Date
- Changing Data in a Combined Project
- Saving and Closing a Combined Project
- Using Only the Combined Project File
- Using Only Subproject Files
- Inserting Subprojects
- Breaking Subproject Links
- Creating a Read Only Subproject
- Inserting Task Links
- Creating a Summary Milestone

Shared Resources

- Understanding Resource Sharing
- Creating a Common Resource Pool
- Linking to an External Pool
- Linking a New Project File to the Pool
- Assigning Resources From the Pool
- Working With Shared Resources
- Checking for Resource Links
- Managing Shared Resources
- Opening Shared Resource Projects
- Opening the Resource Pool Only
- Assembling a Resource Master
- Working With a Resource Master

Downsizing Larger Projects

- Understanding Project Downsizing
- Creating the Resource File
- Creating Smaller Projects
- Linking Subprojects to Resources
- Preparing for the Master Project
- Creating the Downsized Master File
- Setting Project Links
- Finalising the Master

Other Applications

- Understanding Working With Applications
- Copying a Gantt Chart Image
- Copying Table Data
- Copying to Microsoft Excel
- Linking to Microsoft Excel
- Exporting to Microsoft Excel
- Exporting to Excel Using a Map

Microsoft Project VBA

- Understanding Microsoft Project VBA
- Accessing the Developer Tab
- Recording a Macro
- Running a Macro
- Editing a Macro
- Running an Edited Macro
- Localising a Macro
- Running a Localised Macro



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