

Project Management with Microsoft Project – Introduction

2 Day Course

Overview

This course delivers the fundamental scheduling skills that you need to manage projects successfully with Microsoft Office Project 2007, and prepares you for the Managing Enterprise Projects using Microsoft Office Project Server 2007 course. Mastering the Microsoft Project scheduling engine is the key to enjoying your work with the software. This course shows you how to drive the tool through each stage of the project management life cycle and offers multiple best practices for using the software while defining, planning, executing, and closing a project. This course also teaches you how to use all of the new features included in the software. Framed around PMI's project life cycle, the course content is methodology-agnostic and focuses on hands-on learning methods.

Prerequisites

Working knowledge of Windows is required; spreadsheets and project management concepts, recommended.

Materials Provided

Our coursebook, Project Management with Microsoft Project – Introduction, and a certificate of completion.

Project Management Overview

What is a Project?
Understanding the Project Management Process
Definition
Planning
Execution
Control
Closure

Microsoft Project 2007 Overview

Introducing the Global.mpt File
Using the Project Guide
Understanding the Planning Wizard
Navigating in Microsoft Office Project 2007
Tips for Using the Scroll Bars
Using the Zoom In and Zoom Out buttons
Using the Scroll to Task button
Using Screen Tips and Tool Tips
Understanding Gantt Chart Symbols
Reading a Gantt Chart
Understanding Gantt-Optimized Scheduling
Benefits
Creating a Three-Tiered Timescale Bar

Inside Microsoft Project 2007

Understanding the Microsoft Project Data Model
Understanding Views
Using Single-Pane and Combination Views
Understanding Tables
Understanding Filters
Understanding Groups

Project Definition

Defining a New Project
Step #1 – Set the Project Start Date
Step #2 – Enter the Project Properties
Step #3 – Display the Project Summary Task
Step #4 – Set the Project Working Schedule
Step #5 – Set Options Unique To This Project
Step #6 – Save the Project

Project Task Planning

Understanding the Task Planning Process
Creating a Task List Manually
Using a Template
Understanding Change Highlighting
Using Basic Task Planning Skills
Entering and Editing Tasks
Moving Tasks
Inserting Tasks
Deleting Tasks
Creating the Work Breakdown Structure (WBS)
Creating Milestones
Adding Task Notes and Cell Background
Formatting
Using Task Dependencies
Understanding Task Dependencies
Setting Task Dependencies
Removing a Task Dependency
Using Lag Time with Dependencies
Using Lead Time with Dependencies
Using Alternate Methods to Set Dependencies
Setting Task Constraints and Deadline Dates
Setting Constraints
Adding Notes on Tasks with Constraints
Understanding Flexible and Inflexible Constraints
Understanding Planning Wizard Messages about Constraints
Using Deadline Dates
Viewing Missed Constraints and Deadline Dates
Assigning Task Calendars
Understanding Duration-Based and Effort-Based Planning
Estimating Task Durations
Understanding Task Drivers
Creating Recurring Tasks

Project Management with Microsoft Project – Introduction

2 Day Course (continued)

Project Resource Planning

- Defining Project Resources
- Entering Basic Resource Information
- Entering Custom Resource Information
- Entering General Information
- Changing Working Time
- Setting an Alternate Working Schedule
- Entering Nonworking Time
- Setting Working Schedule Changes
- Entering Cost Information
- Entering Resource Notes
- Using the Custom Fields Page

Project Assignment Planning

- Understanding Assignments
- Using a Work Estimation Methodology
- Assigning Resources Using a Best Practice
- Using the Task Entry View
- Understanding the Duration Equation
- Understanding Task Types
- Understanding Programming Biases
- Setting the Cost Rate Table
- Assigning Material Resources
- Using Effort Driven Scheduling
- Using Non-Effort Driven Scheduling
- Using the Assign Resources Dialog
- Using Resource Substitution
- Understanding Resource Overallocation
- Locating Resource Overallocations
- Leveling Overallocated Resources
- Using a Leveling Methodology
- Leveling an Overallocated Resource
- Viewing Leveling Results
- Clearing Leveling Results
- Setting Task Priority Numbers

Project Execution

- Understanding the Execution Process
- Viewing the Critical Path
- Working with Project Baselines
- Saving a Project Baseline
- Saving a “Rolling Baseline”
- Saving Over a Previous Baseline
- Viewing the Project Baseline
- Clearing the Project Baseline
- Using Additional Baselines
- Tracking Project Progress
- Entering % Complete
- Entering Actual Work and Remaining Work
- Using a Daily Timesheet
- Rescheduling Uncompleted Work

Variance Analysis

- Understanding Variance
- Understanding Variance Types
- Understanding Actual vs. Estimated Variance
- Analyzing Project Variance
- Analyzing Date Variance
- Analyzing Work Variance
- Analyzing Cost Variance
- Using Custom Views to Analyze Variance
- What Is A View?
- Creating a New Custom View
- Creating a Custom Table
- Creating a Custom Filter
- Creating a Custom Group
- Creating a New Custom View
- Creating a Combination View
- Using the Organizer
- Copying Custom Objects
- Renaming and Deleting Custom Objects

Plan Revision and Change Control

- Revising a Project Plan
- Potential Problems with Revising a Plan
- Using a Change Control Process
- Inserting New Tasks in a Project
- Rebaselining Your Project
- Rebaselining the Entire Project
- Backing Up an Original Baseline
- Rebaselining Only Unstarted Tasks
- Saving a Baseline for Selected Tasks
- Viewing Multiple Baselines

Project Reporting

- Reporting in Microsoft Office Project 2007
- Printing Views
- Using Page Setup
- Creating a Header or Footer
- Using the Print Dialog
- Printing Reports
- Understanding Report and View Interaction
- Understanding Report Definition
- Creating Custom Reports
- Creating Custom Monthly Calendar Reports
- Creating Custom Crosstab Reports
- Using Visual Reports
- Viewing a Visual Report
- Customizing a Microsoft Office Excel Visual Report
- Customizing a Microsoft Office Visio Visual Report
- Saving Local OLAP Cube Data
- Creating Visual Report Templates
- Editing Visual Report Templates
- Managing Your Visual Report Templates