

# Microsoft Project Essentials

## course factsheet



duration	Two days
availability	Company course listing Public course schedule Project Learning+ Qualifies for 14 PMI PDU Credits
course overview	A comprehensive introduction to the essential techniques for planning and controlling projects using Microsoft Project. Detailed working concepts of the system are explored in depth and hands-on to help plan and control people, tasks and time more effectively. Detailed end of module exercises and challenging multiple-choice questions consolidate topics learned.
designed for	New and experienced Microsoft Project users, wanting an understanding of how to get the best out of the tool, relative to real projects. Supports the following Microsoft Project versions: <ul style="list-style-type: none"><li>• Project 2010 Standard and Professional</li><li>• Office Project 2007/2003/2002 Standard and Professional</li></ul>
prerequisites	Day-to-day Windows™ expertise is required, along with a fundamental project management knowledge. Attendance on one of the following courses would be an advantage: <ul style="list-style-type: none"><li>• Project Management Essentials</li><li>• Project Management Practicalities</li></ul>
follow on learning	To expand upon the competences developed, the following should be considered: <ul style="list-style-type: none"><li>• Project Surgeries</li><li>• Project Mentor</li></ul>

**Project preliminaries**

This initial module introduces the user to Microsoft Project, explains the commands available and how they are accessed. The menu system, toolbars, help and shortcut menus are discussed. The components that make up a project are introduced, to create a new project plan. To this plan, the essential components of a base calendar and a resource pool are added, making the model ready to plan the work to be done.

**Planning the work**

This second module expands the basic project, answering two fundamental questions: What? and How? The reasons for outlining the project are discussed, along with practical ways to create the task hierarchy. Ways to specify the tasks themselves are introduced including task notes and task durations. Methods to relate the tasks together are then examined, along with the necessity for links and how the links can be made. The project's schedule is then reviewed to ensure that it is both accurate and flexible.

**Reviewing the schedule**

The third module looks at how the project's schedule can be viewed and reported upon, answering the question: When? Methods to display words and numbers are explored, as well as the level of detail required both on screen and on paper. Ways to format the graphics within a report are introduced, explaining what the symbols mean and how they can be interpreted. Creating the reports themselves is then introduced, with recommended ways to make the information provided clear and concise.

- Introducing Microsoft Project
- How Microsoft Project communicates with you
- How you communicate with Microsoft Project
- Creating a project document and its properties
- Defining the project's base calendar
- Creating the project's resource pool
  
- Deciding about the project's structure
- Creating the outline of tasks to be done
- Detailing the individual tasks
- Determining task durations and how tasks will be scheduled
- Relating the tasks to each other
- Displaying the structure and the sequence
  
- Looking at project fields within groups of columns
- Formatting how words and numbers are shown
- Filtering and grouping the detail within the rows
- Formatting the bars of a Gantt chart
- Formatting the chart against a timescale
- Sharing information with other applications
- Printing the project's information

### **Assigning people and costs**

As most project schedules involve work, module four introduces how people from the project's resource pool can be assigned to the tasks within the schedule. Tasks become more real when they involve the work of one or more people. How this work gets calculated is examined, together with the many options that are available. Ways to examine the work against time are introduced, along with ways to amend the assignments themselves. As work usually incurs cost, direct and indirect costs are added to the project plan.

- Relating people to tasks
- Making tasks incur cost
- How work against tasks is scheduled
- Changing a task's assignments
- Viewing assignments against a timescale
- Editing discrete assignments

### **Managing external influences**

The fifth module relates the project to the outside world. Why default parameters affect the way it looks and how it is calculated are discussed, along with how common components can be shared between projects. Constraints against tasks are introduced, explaining their importance, how to find them and what effect they have. Changing a resource's availability is discussed, along with the effect that it can have on timings and the potential creation of conflicts.

- Default settings for the project and its schedule
- Sharing components between projects
- Changing relationships between tasks
- Applying, finding and examining task constraints
- Contouring a resource's supply
- Changing a resource's working time

### **Optimising the people against the plan**

In most projects conflicts will occur when demand for a resource is greater than its supply. This module examines why these conflicts occur and illustrates ways to deal with them. Automatic options are looked at, along with how they can be configured and the effect that they can have. Interactive optimisation techniques are introduced, so a manager can fine-tune the way that the people will perform the work.

- How and why resource conflicts occur
- Ways to deal with conflicts
- Automatic optimisation parameters
- Levelling within and beyond end dates
- Changing who works on an assignment
- Reviewing and editing assignments

### **Progressing the plan**

This module looks at what happens once the project is underway. Why projects are updated is discussed, along with the best methods to use. Ways to baseline the project (to provide a reference) are explained, along with how they can be interpreted. Project progress is added automatically and its effect is discussed. Ways to record early progress, late starting, late finishing and over-running tasks are examined and the project updated accordingly. Procedures for moving remaining work into the future are then introduced, making the plan reflect what can be achieved, as well as what has been done.

### **Replanning the future**

This final module looks at ways to keep the project on track; meeting its time, work and cost objectives. Prior to replanning, the importance of finding out where variances exist is introduced, along with determining the cause and the effect of the variance. Ways to get back on track are introduced, with their respective effects upon a project's objectives. Task replanning methods are examined and ways to shorten timescales are explored. Often overlooked, the impact of the update on resources is also explained and the project's assignments are also replanned, so that work by the people can really be achieved.

- Why, what, how and when to update
- Using views to simplify updating
- Baselining to create a reference
- Automatically updating with progress
- Manually entering starts and finishes, plus actual and remaining values
- Rescheduling work still to be done

- The need for replanning a project
- Reviewing the impact of actual progress
- Finding the existence and cause of variances
- Ways to get back on track
- Replanning the tasks
- Replanning who does what and when