

Microsoft Project Professional / Server

duration

Two or three days (customisable around delegate requirements and current system specification and usage).

costs & availability

- ▶ Public course schedule
- ▶ Company course listing

course overview

A practical and thought-provoking workshop explaining techniques for planning and controlling projects using Microsoft Project 2002 / 2003 Professional / Server. Detailed working concepts of the system are explored to help plan and control people, tasks and time in an enterprise environment. Pre-defined or customer-specific exercises test skills and abilities and relate them to practical project environments.

designed for

Microsoft Project 2002 and 2003 users who will be planning projects and utilising resources within an Enterprise Project Management (EPM) environment.

prerequisites

A basic understanding of Microsoft Project, together with general project management knowledge is recommended for attendance. Successful completion of one or more of the following would provide this prerequisite:

- ▶ Project Mentor
- ▶ Project Management Essentials
- ▶ Project Management Practicalities

follow on learning

To expand upon the competences developed, the following should be considered:

- ▶ Project Surgeries



project solutions that make a difference.

course detail

Project preliminaries

This first module is all about getting started with Microsoft Project. You will learn about toolbars and menus, task panes and help. The various ways that data can be viewed are also introduced, together with an explanation about the types of data that can be managed.

Configuring the EPM environment

The second module introduces the EPM environment and how this can be established and configured. You will learn how roles and permissions control what people can see and what they can do. You will create and manage fields that apply to all projects within the enterprise. To define people within the enterprise, you will import existing resource information and then configure it for the needs of all projects. Finally, you will see how projects and tasks are managed in an enterprise environment, together with the calendars that control what can happen when.

Planning the work

This module is all about creating and defining the tasks within a project. You will learn how to create, organize and manage a project's outline. You will then define a duration for each task as your best estimate of how long that task will take to complete. Further task definition will be achieved by using task notes and creating hyperlinks. You will learn how to create links between tasks that will determine the schedule of a project. Finally, you will learn various ways that the project's schedule can be viewed and interpreted.

Reviewing the schedule

This module concentrates on reviewing the schedule of a project. As a project usually has a critical path, you will learn how to emphasize this and also how to indicate slack both graphically and as a value. You will also learn how Microsoft Project can produce information in printed form, together with the wide variety of options on how a printed view can be configured.

course content

- The Microsoft Project user environment
- Communicating with Microsoft Project
- How to create projects
- The building blocks of a project
- How to view the project's data

- EPM overview
- Roles and permissions overview
- Managing enterprise fields
- Managing enterprise components
- Importing resources into the enterprise
- Opening the enterprise resource pool
- Detailed resource definition
- Opening and saving projects
- Importing projects into the enterprise
- Defining tasks within the enterprise
- Calendars within the enterprise

- Defining a project's outline
- Refining an outline
- Defining individual tasks
- Tasks and durations
- Creating links between tasks
- Tasks and the network diagram
- Reviewing the task outline
- Reviewing the sequence of tasks

- Modifying the look of tables
- Formatting the look of text
- Displaying a critical path
- Timescale formatting
- Page setup options
- Setting print parameters

Assigning resources in an enterprise environment

This module explains how resources are defined and assigned to perform tasks within an enterprise environment. Local project resources and resources within an Enterprise Resource Pool are created and configured. Skills are applied to resources and project teams are built to effectively use the skills available. Team members are assigned to tasks relative to the skills and availability that they possess. As assignments are controlled by task types and whether a task is effort driven or not, you will learn how to establish these important parameters and understand the implications that they can have. You will also learn about the impact that assignments can have upon the project's schedule as it now becomes a much more accurate representation of what should happen and when.

- Creating local resources
- Creating skill-based assignments
- Setting up Team Builder
- Creating a project team
- Single person assignments
- Multiple assignments
- Assigning work around availability
- Using materials and money
- Using task types
- Using effort driven tasks

Managing external influences

This module illustrates the effects that the outside world can have upon the tasks and resources within a project. You will learn about the default options that govern how Microsoft Project works; how the project's schedule is calculated, how projects are viewed and edited etc. You will also learn how tasks can be constrained, together with the far-reaching effect that this can have upon the project's schedule.

- Setting look and feel defaults
- Setting calculation defaults
- Local defaults and global defaults
- Changing task dependencies
- Applying task constraints
- Scheduling the tasks directly
- Finding tasks with constraints
- Project-wide constraints

Viewing, analyzing and reporting

This module looks at how data within Microsoft Project can be viewed and effectively managed. You will learn how to create and manage customized information in the form of custom fields, custom views, custom tables, custom filters and custom groups. You will also learn how all these customized components can be shared between projects, thus promoting standardization. As Microsoft Project can provide a wealth of online information, you will also learn how this information can be published and viewed within other PC applications.

- Using global filters
- Creative use of AutoFilter
- Creating and applying custom fields
- Intelligently using sort criteria
- Managing views and tables
- Configuring the network diagram
- Using the calendar view
- Using usage views
- Configuring usage views
- Using resource graphs
- Using task-based reports
- Resource and crosstab reports
- Sharing and publishing project information
- Managing project components

Optimizing people and plans

This module explores the various options available within Microsoft Project to optimize the relationship between a project's tasks and the resources that will perform the work upon the tasks. You will learn how to determine which resources have conflicts, when the conflicts happen, and (most importantly) the reason for the conflicts. You will learn how to compare the project's schedule before and after the conflict is resolved. You will also learn about the various options available to control how Microsoft Project performs the leveling process, together with ways to evaluate the benefits and the impact that the leveling has provided. To help you interactively optimize resource allocations you will also learn various ways to edit individual assignments. Finally, you will learn about the Resource Substitution Wizard and the impact it can have on resource assignments within projects all across the enterprise.

- Dealing with resource conflicts
- How to find resource conflicts
- General leveling parameters
- Detailed leveling parameters
- Reviewing the effects of leveling
- Manual assignment replacements
- Detailed assignment editing
- Using the resource substitution wizard
- Resource substitution and resource leveling

Collaborating information and progressing the plan

This module takes the project from the planning stage into actually performing the work upon the tasks and the achievement of the overall project objectives. You will learn how to create baselines to provide comparisons of what should have been achieved with what has and will be achieved. You will learn how to establish past / future boundaries and how these boundaries can best be applied. To inform your team members and project stakeholders about the project's tasks and assignments, you will publish the plan. Then, assuming the role of a team member, you will review a personal Gantt chart and enter in progress within a personal timesheet. You will also see how work can be delegated to other resources and how you can communicate risks, issues and general documents across the enterprise. When progress information has been updated, you will learn how to accept this information back into the plan and review the impact that it has had. You will also learn how to update tasks with simple time-based progress in terms of completions and actual / remaining time. As work doesn't always proceed according to plan, you will also learn how to reschedule uncompleted work into the future, together with the implications that this can bring.

- Creating baselines
- Displaying progress information
- Setting update boundaries
- Publishing project information and tasks to knowledge workers and stakeholders
- Using Personal Gantt charts
- Delegating work
- Updating personal timesheets
- Working with status reports
- Managing project documents
- Working with risks and issues
- Sending update information
- Receiving and accepting update information
- Reviewing the updated assignments
- Updating tasks with time-based progress
- Rescheduling remaining work

Replanning the future

This module looks at the effect of updates to a project and the variances that they can create. As variances can have a dramatic effect upon the schedule of a project's tasks and its resources, you will learn how to find and evaluate where these variances are and what has caused them. You will also learn how to find where scheduling conflicts exist and determine their cause and also their magnitude. You will learn how to perform an earned value assessment against a project to get an early warning of cost or schedule overruns. Once you have analyzed the effects of the progress, you will then apply methods, skills and abilities learned throughout this training course to amend the schedule and course of the project. You will perform various what-if analyses against tasks, resources and assignments to return the project to meeting its objectives.

- Looking for schedule variances
- Filtering and grouping by schedule status
- Evaluating work and cost variances
- Earned value analysis overview
- Applying earned value analysis
- Replanning tasks to get back on track
- Replanning people's work to get back on track

Analyzing enterprise-wide information

This final module looks at project information across the entire enterprise. Using the Project Center, you will learn how to assess project performance and identify problems and successes, changes and trends. You will also learn how to identify overloads and bottlenecks for particular individuals within the Resource Center, together with skill assessments and capacity planning. Using the Portfolio Analyzer, you will learn how to review and assess project performance across many projects and multiple disciplines. Finally, using the Portfolio Modeller, you will make executive-level assessments of project and resource performance across the entire enterprise.

- Reviewing the schedule progress of projects in the Project Center
- Project performance reviews
- Drilling down into project detail
- Reviewing workload and availability by individual and skill within the Resource Center
- Capacity planning and skill requirements capture Using and creating portfolio analyzer views
- Reviewing OLAP cube settings
- Reviewing and creating portfolio models
- Portfolio models and version control