



## Managing Projects with Microsoft Project

**Delivery:** Traditional classroom/computer lab

**Course No:** PMN-210

**Duration:** 2 days

**Credits:** 14 PDUs/contact hours or 14 CPDs

**Prerequisites:** None

**Course Level:** Introductory/Intermediate

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### About this course

Improve your productivity in planning and scheduling as you discover the project management capabilities and features of Microsoft Project 2010 or 2007. This course is designed to kick start people using Microsoft Project<sup>1</sup> to schedule their project. The focus is on modelling and managing one project well in Microsoft Project, including the development of a schedule, the assignment of resources, estimation, tracking progress and producing reports.

The course reviews the scheduling process in line with the latest edition of the Guide to the Project Management Body of Knowledge (*PMBOK<sup>®</sup> Guide<sup>2</sup>*) and helps users improve their project management skills while using the software to manage project data.

### Who should attend?

**Managing Projects with Microsoft Project** is a course designed for participants who are occasional or regular users of scheduling software. It is suitable for:

- Project managers or senior team leaders in any industry (engineering, IT, finance, manufacturing or business change management) with responsibility for establishing project plans and scheduling resources for business or technical projects
- Project team members with responsibility for contributing components to a larger project plans, such as task lists and work assignments
- Users of other MS Office products who require an understanding of this software package to analyse reports and data extracted from Microsoft Project

### Learning outcomes

The course will assist project managers and team members improve their productivity by learning the major features and capabilities of Microsoft Project, and developing hands-on skills in analysing project data with the software.

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<sup>1</sup> Additional notes and examples are provided for Project 2007 and sample files are available on request for Project 2003

<sup>2</sup> **Acknowledgement:** PMI, the PMI logo, PMP, PMBOK and the PMI Registered Education Provider logo are the registered marks of the Project Management Institute, Inc. Microsoft, Microsoft Office Project and Microsoft Project are registered marks of Microsoft Corp.

Participants will learn how to:

- Understand and use project management terminology and its basic principles
- Develop a project plan (schedule) incorporating tasks and task relationships
- Create and assign project resources, including people, facilities, equipment and materials
- Identify and resolve over-allocated project resources
- Display and edit their project in a variety of views
- Update project progress
- Manage and report project costs and progress
- Extract data and copy project data to other Office products
- Share resources between projects
- View merged or related projects in a portfolio view
- Customise the tables, views, reports and toolbars used in the software to suit their needs and the needs of their organisation

### **Learning approach**

The Course Director will use a variety of interactive methods during the course, including:

- Short presentations supplemented by online resources
- Practice exercises in each feature of the software
- Case study problem-solving
- Suggested evening downloads and web links

The documentation provided gives detailed technical information about the package – its windows, menus, options and capabilities - clarifying the details while users develop practical skills on specific features. Many sample projects are provided to allow hands on exploration of each topic and feature of the software.

Short breaks will be provided for lunch and refreshments.

### **Course materials provided**

Each attendee will receive:

- Complete set of sample files, templates and project documentation
- Comprehensive reference work book
- Sample solution files for case study exercises
- A certificate of attendance confirming PDUs (contact hours) earned

### **Course outline**

Unit 1 Brief introduction to Project Management

- Overview of Project Management and the Planning Process
- Defining the Scope of the Project
- Developing the Project Schedule
- Assigning Project Resources
- Controlling Project Execution
- Role of a scheduling tool like MS Project.

Unit 2 Starting MS Project

- The components of Microsoft Project's interface and its database

- Differences between versions ; menus and toolbars Vs the ribbon interface, tables, built in views, including the View Bar
- Getting started - defining Project Information, data entry, setting the project start date, linking tasks
- Options: project specific options and generic options; removing undesirable options such as manual scheduling (Project 2010) and Effort Driven (Project 2007)

#### Unit 3 Scheduling the project - The Work Breakdown Structure and task dependencies

- Purpose of the Work Breakdown Structure (WBS) – defining deliverables, tasks and their logical relationships; outlining in MS Project
- Task types: Fixed Duration, Fixed units and Fixed Work; recurring tasks
- Estimating durations or work (effort)
- Contingencies in estimating
- Task dependencies/relationships, the Network view and the Critical Path; demo of the add-on WBS-Chart
- Modifying Task Relationships, Project Constraints

#### Unit 4 Adding and assigning resources

- Different types of resources: part-time, full-time, machines, material resources, personnel.
- The project calendar – base calendar and resource calendars; creating and assigning a calendar.
- Entering and Assigning Resources – full-time, part-time and intermittent assignments; single and multiple assignments
- Managing and levelling work loads; resource sheets and resource views; limitations of automated levelling

#### Unit 5 Working with project costs

- Types of cost: fixed costs and variable costs (period cost, per unit cost, per use cost)
- How to model each type of cost in MS Project – labour and facilities, materials and lump sum (firm fixed price costs)
- Using cost rate tables for rate escalation and multiple rates per resource

#### Unit 6 Analysing the project / troubleshooting

- Resolving Time Restrictions
- Resource work-hour considerations
- Resolving Resource Conflicts
- “What if?” analysis

#### Unit 7 Displaying project data

- Objects: views, tables, filters, calendars and maps
- Exploring Views
- Generating Project Reports
- Using drawing tools

#### Unit 8 Sorting and filtering data

- Sorting Project Data
- Filtering Project Data

- Creating Custom Filters

#### Unit 9 Working with data in other Applications

- Importing Data
- Exporting Data
- Copying Project data into other Office applications

#### Unit 10 Setting the baseline plan

- Creating a Baseline Plan
- Previewing a Baseline Report
- Clearing a Baseline

#### Unit 11 Tracking project progress

- Modifying the environment for Tracking
- Entering data for Completed Tasks
- Entering Actual data for Tasks in Progress
- Adjusting the schedule of future tasks

#### Unit 12 Customising the Microsoft Project Environment

- Working with Views
- Working with Toolbars and Macros
- Working with Global Settings
- Using the Organiser utility

#### Unit 13 Advanced features: Resource pools, multiple projects and automation

- Working with a Resource Pool
- Working with Subprojects and Master Projects
- Project macros – automating commands and tool bar buttons

### **Project Management Training from PMN**

Project Managers Network is a Registered Education Provider (#1467) for the Project Management Institute. All our courses offer PMI members Professional Development Units to maintain their PMP certification. This course offers attendees 14 PDUs/Contact Hours

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