



PSI5927 – Managing Project using MS Project 2007

Course description

This three-day instructor-led course provides students with the knowledge and skills to build, maintain, and control well-formed project plans. MS Project is a project management tool that facilitates assembly and tracking of projects, and enables project managers to quickly reconfigure plans as needed. 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.

Who should attend

This course is intended for both novice and experienced project managers and schedulers. These individuals are involved in or responsible for scheduling, estimating, coordinating, controlling, budgeting, and staffing of projects and supporting other users of Microsoft Office Project. A familiarity with key project management concepts and terminology is recommended as well as basic Windows navigation skills.

What you will learn

Get started with Microsoft Office Project 2007.

Create and define projects.

Work with estimates and dependencies.

Work with deadlines, constraints, and task calendars.

Work with resources.

Predict behavior by using task types and the scheduling formula.

Customize and format Microsoft Project views.

Analyze resource utilization.

Track progress.

Create project reports that analyze project, resource, and task data.

Manage multiple projects.

Course Outline

Module 1: Getting Started with Microsoft Office Project 2007

This module provides an overview of Microsoft Office Project 2007 and project management concepts. It explains how to use the desktop interface and how to work with various file types. It also illustrates how to receive help and advice while working with Office Project 2007.

Module 2: Creating and Defining Projects

This module explains how to create new projects, how to define appropriate options, and how to enter, organize, and outline the task list. It also explores ways to import data from other sources and provides guidance on configuring the corporate calendar.

Lab: Creating and Defining Projects

Entering Project and File Properties

Setting Appropriate Schedule Options

Setting Corporate Holidays

Importing Data from Office Excel

Update a Task List

Creating a Multilevel Outline

After completing this module, students will be able to:

Create and save projects.

Define file properties and options.

Create and organize the task list.

Import data.

Modify and apply calendars.

Set schedule options.

Module 3: Working with Estimates and Dependencies

This module explains how to estimate tasks and how to generate a dynamic schedule by creating dependencies between tasks. Various linking and unlinking techniques will be explored in multiple views and link types will be modified to reflect real-world scenarios.

Lab : Working with Estimates and Dependencies

Entering a Duration or Work Estimate

Creating Links Between Tasks

Adding Lag or Lead Times

Displaying Links in Network Diagram View

After completing this module, students will be able to:

Enter task estimates.

Use a PERT (Program Evaluation and Review Technique) analysis to estimate task durations.

Link and unlink tasks by using the Gantt Chart view.

Link and unlink tasks by using the Network Diagram view.

Add Lag or Lead-time to a linked task.

Module 4: Working with Deadlines, Constraints, and Task Calendars

This module explains how to incorporate restrictions in a schedule by using of deadlines and constraints. Displaying, reading, and analyzing the critical path will be discussed, along with how to use task drivers in the analysis. Task calendars will be presented as a technique to get a schedule back in line with a deadline or constraint.

Lab: Working with Deadlines, Constraints, and Task Calendars

Displaying the Critical Path

Setting a Deadline

Setting a Constraint

Responding to Situations Triggered by Deadlines and Constraints

Creating and Apply a Task Calendar to Meet a Deadline

Finding and Removing Constraints in a Schedule

After completing this module, students will be able to:

Introduce deadlines, constraints, and task calendars.

Create and modify deadlines.

Create and modify constraints.

Create and modify task calendars.

Identify critical tasks.

Work with Task Drivers.

Module 5: Working With Resources

This module explains the various types of resources that are needed on a schedule, how to enter the resource list, and how to assign resources to tasks. Changes to the project team will be implemented by modifying resource assignments. Various types of costs will also be covered including resource costs, task costs, and project budgets.

Lab : Working with Resources

Adding Resources to the Resource Sheet View

Creating and Modifying Resource Assignments

Entering Project Costs and Project Budgets

After completing this module, students will be able to:

Describe resources, assignments, and budgeting.

Add resources to the Resource Sheet view.

Create and modify resource assignments.

Understand the fundamentals of project budgets.

Module 6: Predicting Behavior by Using Task Types and the Scheduling Formula

This module explains the scheduling formula and the interaction between the variables duration, work, and units. It also illustrates how recalculations occur when variables are changed. This module explains recommended procedures on changing task types and changing variables for various situations.

Lab: Understanding Task Types and the Scheduling Formula

Identifying the Fixed Variable in a Task and How It Affects the Scheduling Formula

Making Decisions about Task Type and Effort-Driven Settings

Predicting the Scheduling Formula When Changing Variables

After completing this module, students will be able to:

Use Task Types and the scheduling formula for effective calculations.

Change variables and predict behavior.

Apply task types to produce predictable behavior.

Describe special situations within effort-driven scheduling.

Module 7: Customizing and Formatting

This module explains how to format text, bars, and other screen elements. Custom objects will be created including templates, calendars, fields, tables, filters, groups, and views. This module also illustrates use of the Organizer to transfer custom objects to other files.

Lab: Customizing and Formatting

Modifying a Template to Include Corporate Standards

Creating Simple and Complex Custom Fields

Populating a New Table with Existing and Custom Fields

Developing a New Filter And Group

Moving an Object from a Project to the Global.mpp File

After completing this module, students will be able to:

Format screen elements.

Create and modify templates.

Create and modify templates.

Create and modify filters and groups.

Create and modify custom views.

Module 8: Analyzing Resource Utilization

This module explains techniques for manipulating views to display resource allocation and how to identify causes of resource overallocation. Various options for managing limited resources will be explored. In addition, several techniques for solving overallocated resources will be explained, including the leveling feature.

Lab: Analyzing Resource Utilization

Reading and Interpreting Resource Allocation Views

Changing Resource Availability and Interpreting Results

Identifying and Correcting Causes of Resource Overallocation

After completing this module, students will be able to:

Describe resource utilization concepts.

View resource assignments, allocation, and utilization.

Manage resource availability.

Optimize and level resource assignments.

Module 9: Tracking Progress

This module explains how to manage updates to a schedule by saving baselines and tracking duration, work, and cost updates. Comparison between expected and actual results will be illustrated with various views that display variance. In addition, this module provides guidelines on how to troubleshoot a schedule and how to get a troubled schedule back on track.

Lab: Tracking Progress

Setting and Revising a Baseline

Entering Actual Results Updates for Tasks and Resources

Controlling Projects by Finding Variance and Suggesting Corrective Action

Applying Techniques to Shorten Duration, Reduce Work, and Reduce Cost

After completing this module, students will be able to:

Work with baselines.

Enter duration updates.

Enter work updates.

Enter cost updates.

Discover variances.

Trouble shoot schedules and get back on track.

Module 10: Creating Reports

This module explains how to configure views for printing and how to generate standard and visual reports. Customizations to printouts and modifications to existing reports will also be covered. This module will explain how to export data and explore techniques for solving printing issues.

Lab: Creating Reports

Applying Solutions to Various Printing Scenarios

Running Basic Reports That Summarize Data by Project, by Resource, by Task, or by Cost

Developing a New Basic Report

Exporting Data by Using a Custom Map to Merge with Data in an Existing Excel Spreadsheet

Running Visual Reports That Summarize Data by Project, by Resource, by Task, or by Cost

Developing a New Visual Report Template

After completing this module, students will be able to:

Select, edit, and create standard reports.

Configure print and page setup options.

Set options to correct printing issues.

Export project data.

Create and modify visual reports.

Module 11: Managing Multiple Projects

This module explains how to create and manage multiple projects. It will cover links and the critical path across multiple projects. It also discusses how to create and use a shared resource pool and how to view resource allocation across multiple projects.

Lab: Managing Multiple Projects

Inserting Subprojects into a Master Project

Creating Links across Projects and Managing Changes to Linked Tasks

Displaying the Critical Path in a Master Project

Creating and Sharing a Resource Pool

Reading and Interpreting Resource Usage Across Multiple Projects

After completing this module, students will be able to:

Introduce management of multiple projects.

Create master projects.

Create links between projects.

Calculate single or multiple critical paths.

Save and open multiple projects.

Share resources and analyze resource utilization across multiple projects.

Please contact PSI for costs, more details and to register. Costs include all course materials, coffee breaks in the morning and afternoon, lunch and training venue.

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