

# TOTAL SYSTEMS EDUCATION, LTD.

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TSE007

## MANAGING PROJECTS USING MICROSOFT® PROJECT WORKSHOP



### Course Description:

After introducing or reinforcing the necessary Project Management concepts and tools needed to properly understand and use project software, the seminar assists participants gain ability and speed in the use of MICROSOFT® PROJECT. *This is not a “button pushing” class.* The workshop addresses those areas within a project, where the package helps the Project Manager Plan, Organize, Track and Control a project, its schedules, estimates, deadlines, costs and associated resources.

Prior knowledge and use of Microsoft Windows is required.

Upon completion, participants involved with PMI® and the Project Management Institute’s Project Management Professional – PMP program, are awarded 7 PDUs or 7 “Contact hours”. Our R.E.P. code is 1270.

Upon completion of the course, participants will be able to:

- ◆ Understand the Capabilities and Limitations of Microsoft Project in the “*Real World*” Project Environment;
- ◆ Learn how to set up MS Project to reflect the current project environment;
- ◆ Define Tasks and key Task Information;
- ◆ Create various types of Dependencies between tasks;
- ◆ Implement the WBS to Roll-up and Drill-down the project to any level of detail;
- ◆ Using the Network Diagram, verify and adjust task dependencies to ensure accuracy in later scheduling;
- ◆ Define and Assign *Full-time* and *Part-time* Resources;
- ◆ Identify Resource Conflicts, then Analyze and Resolve them using various methods;
- ◆ Track Task Duration for the “in-progress” Project;
- ◆ Use multiple MS Project Report features;
- ◆ Use predefined filters, sorts, tables, reports and views.

Instructional methods for this one-day program include lecture, discussion, question and problem sessions, and *extensive* hands-on exercises using PROJECT (2002, 2003 and 2007). (*For those currently using PROJECT, additional time is spent discussing and using advanced topics and features.*) All participants receive the course workbook, handouts and sample files for on the job reference.



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### Course Outline:

- I. Introduction**
  - A. Course Objectives
  - B. *Microsoft PROJECT* and Project Management
  - C. Essential Project Management Tools and Concepts.  
How to Plan, Organize, Control, Control Changes
  - D. Using Project Management Software (*Without becoming a slave to it!*)
  
- II. As You Begin Using *PROJECT***
  - A. Initial Setup and Hands-on Exercise
    - 1. *PROJECT* and its Icons
    - 2. Start-up Screens
    - 3. Tables (Entry, Work, Tracking, etc.)
    - 4. The Work Breakdown Structure (WBS)
    - 5. Conventions, Views and Hidden Screens  
(Task, Resource etc.)
  - B. The Gantt Chart
    - 1. Calendar
    - 2. Timescale
  - C. Tool Bars
  
- III. PROJECT SETUP**
  - A. Project Information
  - B. Tools Options folders
  - C. Summary Information
    - 1. Naming the Project
    - 2. Mission Statement
  - D. Setting the Calendar  
Working days, Non-Working days
  - E. Saving Options
    - 1. Template
    - 2. Password
  
- IV. TASKS AND INPUT METHODS**
  - A. Entry Table
  - B. Task Information Folder
  - C. Enter/Insert/Change/Delete Tasks
  - D. Making Wholesale Changes
  - E. Recurring Tasks
  - F. Zoom in and out



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### Course Outline (Con't.):

- V. DEPENDENCIES**
  - A. Establishing Dependencies  
*(Why this is a Really good idea!)*
    - 1. Table Column Method
    - 2. Drag and Drop
  - B. Different Relationships  
FS, FF, SS, SF, Lead/Lag Times
  - C. AUTOLINK (Serious Schedule Implications)
  - D. The Critical Path
  
- VI. THE NETWORK DIAGRAM**
  - A. Verifying the Dependencies
  - B. Moving a Task or Group of Tasks
  - C. Layout Now
  - D. Drawing Options
  - E. Creating New Links
  - F. Modifying Dependencies on the Network Diagram
  - G. Adding Tasks to the Network Diagram
  - H. Changing the Information Displayed in the Network Boxes
  
- VII. WORK BREAKDOWN STRUCTURE**
  - A. Creating Phases, Activities
  - B. Indenting, Outdenting
  - C. Roll-Up and Drill-Down the Project
  - D. Summary Information
  - E. Automatic WBS Numbering
  
- VIII. PROJECT RESOURCES**
  - A. Resource Sheet View for Data Entry and Defining Staff  
Name, Initials (Making the Initial Field Worthwhile), Group,  
Units, Cost, Resource Calendar
  
- IX. ASSIGNING RESOURCES**
  - A. Resource Assignment Button (Single/Multiple)
  - B. Split Screen
  - C. Introduction to Part-Time Resources
  - D. Microsoft's formula  $D*U=W$  and its Implications
  - E. Fixed vs. Resource Driven Tasks
  - F. Views



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### Course Outline (Con't.):

#### **X. PRE DEFINED FILTERS, SORTS AND GROUPS**

- A. Task and Resource Filters
- B. Auto Filter
- C. Sorting
- D. Groups
- E. Task Status, by Resource Group

#### **XI. BASELINE and THE PROJECT**

- A. Baselineing the project
- B. Make it Easier to Update the project  
Tracking Gantt, Tracking Table, Tracking Toolbar
- C. Updating the Project Status
- D. Analyzing the Implications

#### **XII. TRACKING THE PROJECT**

- A. Calculations Folder and its Implications
- B. Resource Usage View
  - 1. Setting it up for Weekly Status Reports
  - 2. Using the Tracking Folder
- C. Split screen view with Work Option Selected
- D. Use the Update Work Button

#### **XIII. MS PROJECT REPORTS**

- A. Summary Reports
- B. Current Activity Reports
- C. Cost Reports

#### **XIV. CONCLUSION**

- A. Review what you MUST DO, for PROJECT to help!
- B. Participants Critique Class

