



# Mastering Microsoft Project

## Course Overview:

This three-day instructor-led course provides students with the knowledge and skills plan and manage projects using Microsoft Project. The course focuses on giving participants the skills and knowledge needed for Managing Projects Using Microsoft Project.

To get the most from any project management software, the user must understand the project management techniques upon which the software is based. This course presents the most

popular project management software in the context of how a project manager will use it. Participants in this course learn the functions of the software and the project management concepts that make the software effective.

This course begins with the basic concepts and leads participants through all the functions they'll need to plan and manage a small to medium-sized project, including how to level resources and capture both cost and schedule progress.

The course uses a combination of learning methods. The approach of we will discuss what we are going to show the student, demonstrate to the student and have the student perform an exercise or follow the steps of the instructor in learning a new concept or feature. This course is lectured based coupled with exercises and labs to complement the learning experience. Our goal is to maximize the time students have their fingers on the keyboard, so they can walk out of the course and immediately apply what they have learned.

### Who Should Attend:

The course is intended for information workers with basic understanding of project management concepts. Professionals in the following occupations will find this course extremely useful:

- Program Managers
- Project Managers
- Project Support Staff
- PMO Staff
- PMO Managers
- Project Schedulers
- Project Planners
- Project Engineers
- Project Cost Managers
- Project Team Members

### Learning Objectives:

Attendees of this course will learn the following:

- Understand the discipline of project management as it applies to using Project.
- Learn how to leverage the new Graphic User Interface (Ribbon)
- Create a Work Breakdown Structure
- Identify Task Relationships
- Define Resources within Project
- Make Work Package Estimates
- Learn how to leverage Team planner
- Learn how to inactivate tasks
- Learn how to leverage the task inspector
- Learn how to leverage the Timeline
- Create an Initial Schedule
- Create a Resource Leveled Schedule
- Manage and track the project through the software
- Format Output and Print Reports
- Integrate Multiple Projects
- Set up a Project with a Calendar, Start date, and scheduling method
- Understand Manually Schedule vs. Auto Schedule
- Manage multiple projects.

### Attendees of this course will receive

Microsoft® Project 2010 Step by Step Guide

### Course Duration:

- The duration of this course is 24 hours, and is delivered over 3 full business days.
- Participants can claim 21 PDUs for attending this course.

### Course Components:

#### 1. Module 1: Introduction to Mastering Microsoft Project

This module provides an overview of how the features of Project relate to the job of the project manager.

##### Areas of Learning

- Describe how Project relates to the discipline of Project management.
- Know the significant new features of Project.
- Navigate to the primary views available using the Ribbon
- Choose Views that display task, resource, or assignment information.
- Select table within views to change the information that is available to see and edit.
- Relate the features of Project to the 5 steps for building a plan in Project.

#### 2. Module 2: A Quick and Easy Overview of Managing with Project

This module demonstrates the steps required to create and use Project through the life cycle of a project.

##### Areas of Learning

- Create a new project and prepare it for data entry.
- Enter project tasks.
- Sequence the tasks.
- Define resources.
- Estimate Task duration and assign resources.
- Baseline the project.
- Track project progress.

#### 3. Module 3: Setting Up a Project

This module explains how to create a new project and establish the basic constraints that Project will use for its calculations.

##### Areas of Learning

- Use multiple methods to create a new project, including opening an Excel file and a SharePoint Tasks list.
- Establish one or more calendars to constrain resource availability.
- Configure Project to calculate the schedule from the Start Date forward, or from the Finish Date backward.

#### 4. Module 4: Manually Schedule vs. Auto Schedule

This module explains how to manually schedule project tasks and how to leverage the auto schedule feature.

##### Areas of Learning

- Describe which project functions are turned off for tasks using Manually Schedule mode.
- Change the task mode from Manually Schedule to Auto Schedule and back.
- Identify tasks that are in Manually Schedule mode by the task mode column and shape on the Gantt chart.
- Describe situations that are particularly appropriate for using Manually Schedule.
- Describe the limitations that a user must be aware of when using Manually Schedule mode.

#### 5. Module 5: Creating a Work Breakdown Structure

This module explains how to create a useful work breakdown structure and enter it into Project.

##### Areas of Learning

- Build and use summary and subordinate tasks.
- Understand and use milestones.
- Develop WBS Outlines.
- Assign completion criteria.

- Evaluate the WBS.
- Understand and use WBS templates.

#### 6. Module 6: Identifying Task Relationships

This module explains the rules for establishing dependency links between tasks and presents the features to use Project to establish and display these dependencies.

##### Areas of Learning

- Understand and use the types of task relationships.
- Understand and use various methods to create relationships.
- Determine and display task sequence.
- Understand and use lag, lead, and delay.

#### 7. Module 7: Defining resources within Project

This module explains how to enter resources and specific resource information in Microsoft Project and assign resources to specific tasks.

##### Areas of Learning

- Define individual resources that will be used on the project.
- Record the cost (s) of using each type of resource.
- Record the limit of availability for each type of resource by establishing a resource calendar and defining the maximum units of that resource.

#### 8. Module 8: Making Work Package Estimates

This module explains how Microsoft Project calculates task duration, task work (effort) and task resources. Students will be able to choose among three task types as they enter task estimates and they will know which task type is appropriate for the type of estimate they are making.

##### Areas of Learning

- Enter estimates for duration and costs for each task.
- Distinguish between task types and describe when each is appropriate.
- Describe the relationship between work, units, and duration.
- Describe the way Effort Driven scheduling is affected by work, units, and duration.
- Assign tasks to resources using the Team Planner view.

#### 9. Module 9: Creating an Initial Schedule

This module explains how Project calculates a schedule based on task relationships and task duration. Students will understand the purpose of identifying critical path tasks and will be able to identify schedule float within the project.

##### Areas of Learning

- Calculate the Schedule: The Theory Behind the Software.
- Critical Path.
- Schedule Float.
- Constraints.
- Deadlines.
- Task Relationships and Crashing a Schedule.
- Milestones.
- Task Inspector.

#### 10. Module 10: Create a Resource Levelled Schedule

This module explains how over-allocated resources create unrealistic schedules and shows methods for rescheduling in order to create a realistic schedule based on resource availability.

##### Areas of Learning

- Project Statistics.
- Resource Graph and Resource Sheet.
- Resource Usage View.
- Resource Allocation.
- Task Usage View.

- Realistic Resource Planning.
- Resource Levelling.
- Levelling Settings.
- Levelling Settings Defined - Levelling Calculations.
- Levelling Settings Defined - Resolving Over-allocations.
- The Levelling Gantt Demonstrates Results of Levelling.
- Manual Levelling.

#### 11. Module 11: Managing the Project

This module explains how to use Project to control a project. Students will save their plan to a baseline and see how entering actual task performance data enables them to view differences between planned and actual performance. This module has 3 lab exercises to complete.

##### Areas of Learning

- Tracking Field Definitions.
- Creating the Project Baseline.
- Displaying the Baseline on a Gantt Chart.
- The Tracking Gantt.
- Recording Progress Using % Complete.
- Updating Task and Resource Status.
- Recording Progress Using Actual Work.
- Variance.
- Percent Complete.
- Cost.
- Evaluating and Displaying Variance.
- Scheduling interruptions.
- Splitting tasks.
- Rescheduling Work.

#### 12. Module 12: Formatting Output and Printing Reports

This module explains how to format the many views and reports available in Project.

##### Areas of Learning

- Formatting the Timeline
- Using the Gantt Wizard
- Visual Reports
- Standard Reports
- Custom Reports
- Editing a Custom Report
- Reports
- Grouping, sorting, and filtering
- Copy Picture to Office Wizard
- More Formatting for the Gantt Chart
- Reporting Against Budget
- Creating a Budget

#### 13. Module 13: Managing Multiple Projects

This module explains how to view many projects as parts of one very large project in order to gain new views on resource availability and task relationships among projects.

##### Areas of Learning

- Integrating Multiple Projects
- Consolidating Project Files
- Resource Pools
- Summary

#### 14. Module 14: Advanced Topics

This module explains how to leverage some of the advanced features of Project.

##### Areas of Learning

- Customizing WBS Prefix
- Applying Grouping and Grouping customized Fields
- Applying Filtering functions
- Leveraging Global Templates
- Identify resource delay within a Task
- Applying Deadlines to a project

#### 15. Module 15: Summary

This module provides an overview of the topics presented in the course.



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