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# Microsoft Project Training Course Brochure



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# Microsoft Project Training Course Brochure

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**Course Code** MSPRL1  
**Duration** 1 day

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## Overview

During this course you will create and manage a project schedule using Microsoft Project.

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## Audience

This course is designed for people who have an understanding of Project Management concepts and who are responsible for creating and modifying Project plans and who need a tool to manage these plans.

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## Learning Objectives

By actively participating in this course, you will learn about the following:

- ▶ Getting Started and Using Project
  - ▶ Set up a Project
  - ▶ Work with Tasks, Notes and Milestones
  - ▶ Manage Dependencies between Tasks
  - ▶ Manipulate Tasks and Constraints
  - ▶ Resources
  - ▶ Overview of Views and Printing Options
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## Pre-Requisites

To be successful in this course, you should be familiar with using personal computers and have used a mouse and keyboard.

You should have a basic understanding of Project Management concepts and basic end-user skills with any current Windows operating system.

## Software Requirements for Virtual Classroom

Delegates will need to have Microsoft Project 2013, 2016, 2019 or 365 (desktop version) installed on their PC to participate in Virtual Classroom courses; any other Project Management software is *not* suitable for this course.

This course is not suitable for MAC users.

## Course Contents

### Getting Started and Using Project

- ▶ Installing the Sample Files
- ▶ Getting Started and Using Project
- ▶ The Project 2016 Screen
- ▶ The Ribbon
- ▶ Closing Microsoft Project
- ▶ Opening an Existing Microsoft Project Document
- ▶ Changing Project Views
- ▶ Creating a New Project Based on a Different Template
- ▶ Closing the Current Project Document
- ▶ Project Help Screen

### Setting up a Project

- ▶ Setting Up a Project
- ▶ Editing Your Project File Properties
- ▶ Inputting Start and Finish Dates
- ▶ Selecting a Project Calendar Type
- ▶ Making a New Calendar
- ▶ Applying a Customised Calendar
- ▶ Saving a Project
- ▶ Setting Up Currency Within Microsoft Project

### Tasks, Notes and Milestones

- ▶ Overview of Tasks?
- ▶ Entering Tasks
- ▶ Entering Subtasks
- ▶ Entering Task Durations
- ▶ Creating a Summary Task
- ▶ Recurring Tasks
- ▶ Task Notes
- ▶ Milestones
- ▶ Display Outline Numbers
- ▶ Create a Custom WBS Code
- ▶ Create and Assign a Task Calendar
- ▶ Add Summary Tasks and Milestones to the Timeline

### Dependencies

- ▶ What are Dependencies
- ▶ Finish to Start
- ▶ Start to Start
- ▶ Finish to Finish
- ▶ Start to Finish

### Manipulating Tasks and Constraints

- ▶ Overview of Constraints
- ▶ Adding Constraints
- ▶ Editing Tasks
- ▶ Deleting Tasks
- ▶ Moving Tasks

### Resources

- ▶ What are Resources
- ▶ Learn more about Resource Units
- ▶ Creating a Resource List
- ▶ Working Time
- ▶ Rates
- ▶ Resource Notes
- ▶ Assigning Resources
- ▶ Resolving Resource Overallocations
- ▶ Overview of Baseline

### Overview of Views & Split Windows

- ▶ Overview of Microsoft Project Views?
- ▶ Changing Views
- ▶ Splitting the Window

**Course Code** MSPRL2.1  
**Duration** 1 day

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## Overview

This course builds on the concepts and skills taught in the Microsoft Project Level 1 course. You will learn how to work to a more in-depth level with Microsoft Project and how to integrate Project data with other Office applications.

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## Audience

This course is designed for people who have the ability to create and update project plans using Microsoft Project and wish to build on those skills to create more comprehensive project plans.

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## Learning Objectives

By actively participating in this course, you will learn about the following:

- ▶ Baselines and Interim Plans
  - ▶ Update a Project Plan and Monitor Progress
  - ▶ Analyse and Adjust the Project Plan
  - ▶ Work with Delays and Conflicts
  - ▶ Importing & Exporting Data
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## Pre-Requisites

To be successful in this course, we recommend that you attend the following courses or have equivalent knowledge:

- ▶ Microsoft Project Level 1

## Software Requirements for Virtual Classroom

Delegates will need to have Microsoft Project 2013, 2016, 2019 or 365 (desktop version) installed on their PC to participate in Virtual Classroom courses; any other Project Management software is *not* suitable for this course.

This course is not suitable for MAC users.

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## Course Contents

### Baseline and Interim Plans

- ▶ Save and View Multiple Baselines in a Single Project
- ▶ Use Interim Plans to Compare Date Movements

### Update a Project Plan and Monitor Progress

- ▶ Update Task Progress using Actuals
- ▶ Perform Updates using the Status Date
- ▶ Reschedule Incomplete Work
- ▶ Monitor Progress with Earned Value

### Analyse and Adjust the Project Plan

- ▶ Display Slippage and Slack in your Schedule
- ▶ Splitting a Task
- ▶ Understanding Resource Units
- ▶ Changes in Resource Assignments
- ▶ Understanding Effort Driven Scheduling
- ▶ Working with Fixed Task Types
- ▶ Identify the Critical Path or Paths in a Programme
- ▶ Shorten the Schedule

### **Work with Delays and Conflicts**

- ▶▶ Delay Work for a Resource
- ▶▶ Assign Overtime and Extra Resources
- ▶▶ Use the Task Inspector
- ▶▶ Using Team Planner View
- ▶▶ Inactivate Tasks
- ▶▶ Move a Project

### **The Critical Path**

- ▶▶ What is the Critical Path?
- ▶▶ Understanding Slack Time
- ▶▶ Working with Multiple Critical Paths

### **Importing & Exporting Data**

- ▶▶ Importing Data from another Office Application
- ▶▶ Exporting Data to another Application

**Course Code** MSPRL3.1  
**Duration** 1 day

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## Overview

Having learnt how to plan and develop a project schedule in MS Project, you are now looking to improve your skills by understanding how to manage these abilities across multiple projects using shared resources. You will also discover more effective ways to manage costs alongside advanced calculation methods when updating your project.

**Please Note:** If you attended our Project Level 3 course **prior to 01 May 2022**, this is the next course in your Training Path (see below) as we have swapped the content of Level 3 and 4 around. You will still receive a Project Level 4 certificate. Please make us aware of this at the time of booking and contact us if you are unsure which course is appropriate for you.

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## Audience

This course is designed for MS Projects users who already have existing knowledge on how to create and modify project plans and are looking to further their skills especially when working with multiple project and shared resources.

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## Learning Objectives

By actively participating in this course, you will learn about the following:

- ▶ Managing Costs
  - ▶ Advanced Options when Updating a Project
  - ▶ Managing Multiple Projects
  - ▶ Sharing Resources and Working with Resource Pools
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## Pre-Requisites

To be successful in this course, we recommend that you attend the following courses or have equivalent knowledge:

- ▶ Microsoft Project Level 1
- ▶ Microsoft Project Level 2

You should also have an understanding of project management concepts.

## Software Requirements for Virtual Classroom

Delegates will need to have Microsoft Project 2013, 2016, 2019 or 365 (desktop version) installed on their PC to participate in Virtual Classroom courses; any other Project Management software is *not* suitable for this course.

This course is not suitable for MAC users.

## Course Contents

### Managing Costs

- ▶ Working with Cost Rate Tables
- ▶ Changing Costs Rates for Specific Tasks
- ▶ Using Rate Tables with a Resource Pool
- ▶ Alter Costs based on Time Periods
- ▶ Managing Overtime Costs
- ▶ Understanding Budget Costs and Resources

### Advanced Options when Updating a Project

- ▶ Calculation Options for Scheduling
- ▶ Advanced Calculation Options
- ▶ Updating Actual Overtime Work
- ▶ Updating Actual Assignment Information

### Managing Multiple Projects

- ▶ Consolidating and Sharing Projects
- ▶ Viewing the Critical Path across Multiple Projects
- ▶ Comparing Projects

### Sharing Resources

- ▶ Understanding Resource Pools and Sharer Files
- ▶ Connect a Project to a Resource Pool
- ▶ Assign Resources across Multiple Projects
- ▶ Resolve Resource Overallocation
- ▶ Priority Settings and Levelling Resources



**Course Code** MSPRL4.1  
**Duration** 1 day

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## Overview

Having already learnt how to create and edit basic plans in Microsoft Project, you find that you need to record additional information that the Standard Project Template does not accommodate for. To overcome this, you will learn how to customise all areas of Microsoft Project, exchange project plan data with other applications and reuse project plan information. You will also look at creating custom reports using both the built in Reporting tools plus Power BI.

**Please Note:** If you attended our Project Level 3 course **prior to 01 May 2022**, you need to attend our existing [Project Level 3.1](#) course (see Training Path below), as we have swapped the content around into Level 4. You will, however, receive a certificate for Project Level 4. Please make us aware of this at the time of booking and contact us if you are unsure which course is appropriate for you.

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## Audience

This course is designed for a person who has the basic skills to create and modify project plans using Microsoft Project and needs to use Microsoft Project to manage and customise those plans.

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## Learning Objectives

By actively participating in this course, you will learn about the following:

- ▶▶ Create Custom Project Fields, Filters, Tables and Filters
  - ▶▶ Import Custom Data from Excel into Project
  - ▶▶ Create Custom Views and Macros
  - ▶▶ Work with the Organizer Tool to Share Custom Items
  - ▶▶ Reporting on your Project
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## Pre-Requisites

To be successful in this course, we recommend that you attend the following courses or have equivalent knowledge:

- ▶▶ Microsoft Project Level 1
- ▶▶ Microsoft Project Level 2

You should also have an understanding of project management concepts.

## Software Requirements for Virtual Classroom

Delegates will need to have Microsoft Project 2013, 2016, 2019 or 365 (desktop version) installed on their PC to participate in Virtual Classroom courses; any other Project Management software is *not* suitable for this course.

This course is not suitable for MAC users.

## Course Contents

### Customising Microsoft Project

- ▶ Create Custom Fields
- ▶ Importing Excel Data
- ▶ Create Custom Tables
- ▶ Create Custom Filters
- ▶ Using the Organizer Tool
- ▶ Create Custom Views
- ▶ Develop a Macro to Automate a Procedure

### Create Custom Reports

- ▶ Overview of Microsoft Project Reports
- ▶ Creating a Burndown Report
- ▶ Create a New Report
- ▶ Overview of Power BI and how it can be used to Report on Project Information