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Microsoft Project
COURSE

Primavera P6 Professional Training is designed to take you from foundational understanding to advanced level in one of the world's leading project management tools

OUR COURSE

- Basic Level
- Intermediate Level
- Advance Level

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COURSE CONTENT

Microsoft Project Training

Course Overview

During this course, delegates will learn to:

- Schedule a project
- Assign resources
- Adjust the project schedule
- Execute and control the project
- Create a project
- Add activities

Course Objectives

Upon successful completion of this course, delegates will have the skills necessary to:

- Understand data structures
- Create a project
- Create a Work Breakdown Structure
- Add activities
- View calendars
- Create relationships
- Schedule the project
- Assign constraints
- Format schedule data
- Define roles and resources
- Assign roles
- Assign resources
- Analyze resources
- Optimize the project plan
- Execute the project
- Create reports

Course Outline

Lesson 1 – Ready your PC for MSP

- Customize the Quick Access Toolbar
- Access the Standard Views Quickly
- Annoyance: Set the Type of Tasks to "Not Effort Driven"
- Annoyance: Remove Timeline from the Opening View

- Annoyance: Manual vs Auto Scheduling of Tasks

Lesson 2 – **Create and Use Templates**

- Create a Template
- Use an Existing Template
- Modify an Existing Template
- Using Templates from Microsoft

Lesson 3 – Configure Options in MSP

- Configure the GENERAL Options
- Configure the DISPLAY Options
- Configure the SCHEDULE Options
- Configure the PROOFING and SAVE Options
- Configure the ADVANCED Options
- Option to Show Project Summary Task

Lesson 4 – Use the Global Template to Share Components

- Use the Organizer to Share MSP Components
- Back up global.mpt

Lesson 5 – Setup the Parameters for a New Project

- Create a new project and Enter its Initial Information

Lesson 6 – Manage Project Calendars

- Create a New Calendar or Modify an Existing Calendar
- Where do we Use Calendars?
- Trouble Shoot Task Assignment Calendars

Lesson 7 – CASE PROJECT: Prepare the Project File and Calendar

- CASE PROJECT - Setup Project, Calendar and Formats

Lesson 8 – Customize Views and Tables (Tasks/Resources)
- Introducing the 3 Internal Tables of MSP
- The Task/Resource/Assignment Information Box
- Access Views and Tables
- Customize Views/Tables to Include Fields of Your Choice
- Access More Views or Tables
- Edit an Existing View Definition

- Edit an Existing Table Definition
  Create a New View
- Create a New Table Definition
- Copy Views and Tables to Edit them
- Style, Grids and Layout of Task, Resources and Assignments
- Change Bar Styles for Task Views with Gantt Charts
- Annoyance: Remove Resources from Bars on Gantt Chart
- Hint for Viewing Resources on the Gantt Chart
- Change the Styles of the Timescale
- Use Change Highlighting to Analyze What IF Situations
- Use Two Types of Highlighting
- Group Tasks, Resources or Assignments
- Customize Fields (Tasks and Resources)
- Use the Split View in the Gantt Chart
- Import Tasks from Microsoft Outlook

Lesson 9 – Create and Run Macros

- Record a New Macro
- Run a Macro
- Place the Macro on the Quick Access Toolbar
- Create a Useful Macro: to Color 4 Dates in a Project

Lesson 10 – Setup the WBS by Creating and Grouping Tasks

- Create Tasks (or Rows in MSP)
- Add More Columns or Fields (Also Applies to Resources)
- Outline a Project or Organize Tasks into Phases
- Use Outline Fields for WBS Definition
- Add Notes to Tasks (also Resources and Assignments)
- Link Tasks to Documents and Pages (also Resources and Assignments)
- Use Filters to Select Tasks (also Resources and Assignments)
- Import Tasks, Resource and Assignments from Excel
- Export Tasks, Resources and Assignments from a Project

Lesson 11 – View and Customize Reports in MSP

- Compare Projects
- Develop a New Report
- View the Standard REPORTS
- Using the Visual Reports Export
- Edit an Existing Visual Report Template
- Create a New Visual Report Template
- Export Data to a Reporting Database

Lesson 12 – Schedule Tasks: Enter Task Duration

- Use Milestones in a Project
- Use Estimated vs Confirmed Duration
- Use Elapsed Duration (Working or Calendar Days)
- Constrain Tasks to Specific Date Conditions
- Set Deadline Reminders
- Set Reminders as Tasks in OUTLOOK

Lesson 13 – Schedule Tasks: Manipulate Task Dependencies

- Examine the Critical Paths of a Project
- Calculate the Critical Path Manually
- Allow MSP to Show Multiple Critical Paths
- View Critical Paths in Different Ways
- The Finish-to-Start Task Dependency (Default Setting)
- Three Other Types of Task Dependencies
- Overlap or Separate Tasks in Time using the Lead Time
- Review Task Dependencies in Four Different Ways
- Guidelines when Scheduling Dependencies
- Use the Task Inspector Pane
- Split a Task to Interrupt Work on it
- Enter Recurring Tasks
- Use Hammock Tasks for Combined SS/FF Dependency

Lesson 14 – CASE PROJECT: Setup the Schedule

- CASE PROJECT: Setup Tasks (WBS)
  - Different Views to Access Resources
  - Enter Work Resources on the Resource Sheet
- CASE PROJECT: Setup Work Resources
  - Manipulate the Resource Sheet
  - Import Resources from Excel
  - Assign a Calendar to a Resource's Working Time
  - Specify a Resource's Availability over Time
  - Specify Different Rates for a Resource
  - Specify Multiple Rates for Different Periods for a Resource
  - Understand the Concept of Driver Resources

Lesson 15 – Define Resources: Material

- Specify Material Resource on the Resource Sheet
- CASE PROJECT: Setup Material Resources

Lesson 16 – Define Resources: Costs

- Specify Cost Resources

- Enter the Cost per Use for Resources
- CASE PROJECT: Setup Cost Resources

Lesson 17 – Assign Resources to Tasks

- The Assignment Information Box
- Assign Resources Using the Task Information Box
- Assign Resources Using the Split Page
- Assign Resources Using the Assign Resources Box
- Select and Filter Resources with the Assign Resources Box
- CASE PROJECT: Assign Work Resources to Tasks
  - Assign a Fixed Quantity of Material Resources to a Task
  - Assign a Periodic Quantity of Material to a Task
  - Assign Fixed Costs to a Task
  - Assign Cost Resources to a Task
  - Assign Resources to a Hammock Task (and Mix Resources)
  - Understanding Time Phased Work on a Task (Day by Day)
  - Assign Work on a Time Phased Basis
- CASE PROJECT: Assign Material Resources
- CASE PROJECT: Assign Cost Resources to a Task
- CASE PROJECT: Prepare for Later Use
- Enter Additional Data for Resources
- Assign One of the Multiple Resource Rates
- Apply Contours (Work Levels) to Assignments

Lesson 18 – Manage Cash Budgets via Cost Resources

- Enter and Manage Budget Resources

Lesson 19 – Analyze Assignments: The Task / Resource Usage Views

- View Resources Assignments using the Split View
- View Resource Workloads
- View Overallocated Resources
- Use the Time Planner to Manage and View Assignments
- Use the Resource Graph
- View the Graphs of Resource Availabity
- Access the Time Phased Views: Task and Resource Usage
- Change Details (Rows) in the Task/Resource Usage View
- Review Individual Task or Resource Costs
- Review Assignment Costs

Lesson 20 – Use the Work Formula to Adjust Assignments

- What is the Work Formula?
- What are Task Types?

- What is the Effort Driven Setting?
- Try ALL Combinations in the Work Formula
- Which Settings to use for Task Types and Effort Driven?

Lesson 21 – Optimize the Project: Reduce Duration and Costs

- Shorten the Project Through Task Adjustments
- Adjust Assignments Availability to Reduce Costs
- Use MSP's Leveling Options (Or Don't Use...)
- Use Overtime to Reduce Over-Allocation

Lesson 22 – Handle Multiple Projects

- Consolidate Several Projects into One
- Cross Link Projects (Dependencies)
- Use Resource Pools to Share amongst Several Projects