

Microsoft Project : Intermediate

Aims

The aim of this course is to build on the concepts introduced in the **Introduction To Microsoft Project** course, developing your skills in working with project plans, and ensuring you can confidently adapt them to changes in project circumstances.

On completion of this module you should be able to

- Produce standard reports both for printing and exporting
- Rework the plan to respond to changed circumstances
- Use the critical path to identify where time savings can be made
- Adjust resource and task calendars to deal with exceptions
- Implement costs against resources and produce financial reports
- Export data for reporting to parties who do not have Project.

1 Review of Basics

Aims

This session provides an overview of topics covered in the Introduction to Microsoft Project course with the aim of reinforcing the fundamentals of project planning using Project.

Objectives

- Using different Project views
- Fundamentals of creating a plan
- Establishing and editing task relationships
- Assigning resources to tasks
- Grouping tasks and using outlining
- Viewing the critical path
- Formatting and printing
- Tracking your project

2 Tracking the project and recording actuals

Aims

To practice updating a project plan from progress information received from your project team.

Objectives

- Use the tracking tools to update your plan
- Reschedule incomplete tasks automatically
- Use progress lines to show how close to plan you are running
- Make use of Tracking Gantt view

3 Progress reporting, grouping and filtering

Aims

To become familiar with the standard reports provided by Project, for purposes of reporting the progress and status of the project. Also to learn how to use filtering and grouping to refine the view of the project plan.

Objectives

- Learn how to run the standard reports
- Use pre-defined filters to tailor views
- Use autofilter to conveniently limit the data listed
- Use custom autofilter to specify filter criteria
- Apply grouping and use it to show data as required
- Run standard reports
- Customise reports

4 Editing the plan and making a new baseline

Aims

To become confident at making alterations to plans and to understand the effect this has on tracking.

Objectives

- Edit a plan which is already underway
- Monitor the effect of the changes on deadlines
- Judge when a baseline is no longer a suitable reference point
- Create a new baseline

5 Critical Path analysis and reporting

Aims

To use the critical path tools to resolve the problem of the project slipping past the required end-date.

Objectives

- Display critical path and slack to identify what tasks must be addressed in order to shorten project delivery time
- Produce critical path reports
- Identify resource allocations which will reduce overall project time

6 Adjust resource and task calendars

Aims

To use calendars to help implement sophisticated changes to your plan, working with both specific resource calendars, and adjusting the calendar for a specific task.

Objectives

- Learn how to view the details of the project calendar
- Learn how to assign specific calendars to specific resources
- Learn how to adjust the calendar for a specific task

7 Costing and financial reporting

Aims

To understand how to enter fixed and resource costs in Project, how to select the method of accruing costs, and how to vary pay rates according to time period or role.

Objectives

- Enter cost information for tasks
- Enter cost information for resources
- Vary resource cost by time period
- Vary resource costs by role
- Display cost information

8 Exporting information

Aims

To learn how to deliver Project information electronically to parties who do not have Microsoft Project.

Objectives

- Produce PDF version of your plan
- Export to Excel
- Export to a web page