

# Introduction to Microsoft Project

## Aims

The aim of this course is to give you a comprehensive introduction to Microsoft Project and its uses in Project Management, and to enable you to use its features in planning and running projects.

On completion of this course you should be able to

- Open, update and save existing project plans
- Create new project plans
- Schedule tasks
- Manage resources within the plan
- Format and print a Gantt chart
- Pass project information to people who don't have Project installed
- Track progress on your project

## 1 Getting Started

### Aims

This session aims to introduce Microsoft Project as a project management tool, ensure you can configure the software for your own use and explain the main views provided.

### Objectives

- Create new and open existing project plans
- Adjust basic settings
- Understand Project views
- Use Help

## 2 Creating the plan

### Aims

To enable you to create the foundation for a project plan and enter tasks and durations into the schedule.

### Objectives

- Enter project information and properties
- Enter tasks
- Group tasks

## 3 Task relationships

### Aims

In this session you use Project tools to specify the dependencies between tasks, and thereby to schedule your project.

### Objectives

- Understand the different types of link
- Create links between tasks
- Create recurring tasks
- Split tasks
- Create project milestones

## **4 Assigning Resources to Tasks**

### Aims

This session enable you to identify resources in your project plan, and allocate them tasks.

### Objectives

- Set up people and equipment resources
- Understand the ways in which they might be handled differently in the plan
- Know how to assign tasks to resources
- Know how to view resource information

## **5 Outlines and Critical Path**

### Aims

This session will enable you to manipulate your project plan using outline tools to create and alter the structure of your project plan, and to view varying levels of detail.

### Objectives

- Understand summary tasks
- Use indent and outdent tools to create different levels of summary tasks
- Arrange the project plan view to show the required level of detail
- Rearrange groups of tasks

## **6 Resource Allocation**

### Aims

This session enables you to use Microsoft Project's resource allocation tools to optimise the use of resources in your project plan.

### Objectives

- Know how to view resource allocation information
- Understand the options for resource levelling
- Know how to use automatic resource levelling

## **7 Formatting and printing the Gantt Chart**

### Aims

This session enables you to tailor the display of your Gantt chart to suit your project, and to print Gantt charts effectively.

### Objectives

- Know the formatting options on the Gantt chart
- Know how to arrange printing options to show your plan effectively across multiple sheets

## 8 Calendars

### Aims

To develop an understanding of how calendars are used by Microsoft Project, and how they can be defined for projects and individual resources.

### Objectives

- Understand how calendars are used in scheduling
- Define the project calendar
- Alter the project calendar
- Alter the calendar for an individual resource

## 9 Tracking a project

### Aims

To enable you to make use of your project plan during the life of the project to keep track of activities in comparison with your plan.

### Objectives

- Save a baseline for reference
- Report progress using tracking tools
- View progress using the tracking Gantt

## 10 Filtering, Grouping and Reports

### Aims

To enable you to use the filter, group and report functions in Project to extract information from your project data.

### Objectives

- 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