

Course 50268A Establishing a Project Management Foundation using Microsoft Office Project 2007

Length:	2 Days
Published:	September 01, 2009
Language(s):	English
Audience(s):	Information Workers,IT Professionals,Developers
Level:	200
Technology:	Microsoft Office Project 2007
Type:	Course
Delivery Method:	Instructor-led (classroom)

[Overview](#)

[Course Details](#)

[Prerequisites](#)

[Community](#)

About this Course

This two-day course delivers the fundamental scheduling skills that you need to manage projects successfully with Microsoft Office Project 2007, and prepares you for the Managing Enterprise Projects using Microsoft Office Project Server 2007 course. Mastering the Microsoft Project scheduling engine is the key to enjoying your work with the software. This course shows you how to drive the tool through each stage of the project management life cycle and offers multiple best practices for using the software while defining, planning, executing, and closing a project. This course also teaches you how to use all of the new features included in the software. Framed around PMI's project life cycle, the course content is methodology-agnostic and focuses on hands-on learning methods.

Audience Profile

Everyone who manages projects using Microsoft Office Project 2007 should take this course, whether in an enterprise or desktop-only environment. This course targets the needs of full-time project managers, as well as those who function as project schedulers or project support

technicians. For those who need to take and pass the Microsoft 70-632 certification exam, this course is vital!

At Course Completion

After completing this course, students will be able to:

- Describe the stages of the project management process.
- Understand the Microsoft Project user interface.
- Understand the Microsoft Project Data Model as it relates to Views, Tables, Filters, and Groups.
- Define a new project.
- Perform all required task planning and understand how to use task dependencies and task constraints properly.
- Add resources to a project and assign resources to tasks.
- Save a baseline for a project.
- Enter task progress using three different methods of tracking progress.
- Analyze project variance.
- Create custom Views, Tables, Filters, and Groups.
- Revise a project based on project variance.
- Change a project based on change control methodologies and rebaseline the project using multiple methods.
- Report on project progress by printing Views and Reports, and by using Visual Reports with Microsoft Office Excel and Visio.
- Close a project.

Course OutlineModule 1: Project Management Overview

This module sets the stage for the proper use of Microsoft Office Project 2007 by focusing on the definition of a project and the major steps in the project management life cycle.Lessons

What is a Project?

Understanding the Project Management Process

After completing this module, students will be able to:

Define the term "project."

Understand the project management life cycle as it applies to the use of Microsoft Office Project 2007.

Module 2: Microsoft Office Project 2007 OverviewThis module introduces the student all aspects of the Microsoft Office Project 2007 user interface, teaches the student how to navigate effectively within a project, and helps the student to understand the meaning of all the symbols used in the Gantt Chart view of a project.Lessons

Introducing the Global.mpt File

Using the Project Guide

Understanding the Planning Wizard

Navigating in Microsoft Office Project 2007

Understanding Gantt Chart Symbols

After completing this module, students will be able to:

Understand the purpose of the Global.mpt file.

Display, use, and hide the Project Guide.

Understand the purpose of the Planning Wizard.

Define the features shown in the Microsoft Office Project 2007 user interface.

Use tips and tricks to navigate in a project in Microsoft Office Project 2007.

Module 3: Inside Microsoft Office Project 2007

This module explains the simplified Microsoft Project Data Model as it applies to Views, Tables, Filters, and Groups in Microsoft Office Project 2007. This module introduces the student to the most commonly used Views, Tables, Filters, and Groups in the application. Lessons:

Understanding the Microsoft Project Data Model

Understanding Views

Understanding Tables

Understanding Filters

Understanding Groups

Lab : Inside Microsoft Office Project 2007

Exercise 3-1: Apply task and resource Views in Microsoft Office Project 2007.

Exercise 3-2: Apply task and resource Tables in Microsoft Office Project 2007.

Exercise 3-3: Apply a standard Filter in Microsoft Office Project 2007.

Exercise 3-4: Apply a Highlight Filter in Microsoft Office Project 2007.

Exercise 3-5: Apply task and resource Groups in Microsoft Office Project 2007.

After completing this module, students will be able to:

Explain the simplified Microsoft Project Data Model as it applies to Views, Tables, Filters, and Groups.

Apply task and resource Views.

Apply a combination View.

Apply task and resource Tables.

Apply task and resource Filters.

Use Cell Background Formatting with a Highlight Filter.

Apply task and resource Groups.

Module 4: Project Definition

This module begins the process of learning to use Microsoft Office Project 2007 by following the

project management life cycle. This module teaches the student how to define a new project using a six-step process and how to create new base calendars for specific scheduling needs. Lessons

Defining a New Project: Step #1 - Set the Project Start Date; Step #2 - Enter the Project Properties; Step #3 - Display the Project Summary Task; Step #4 - Set the Project Working Schedule; Step #5 - Set Options Unique To This Project; Step #6 - Save the Project

Lab : Project Definition

Exercise 4-1: Set the project Start date.

Exercise 4-2: Enter the Properties of the project.

Exercise 4-3: Display the Project Summary Task in the project.

Exercise 4-4: Set company holidays as nonworking time on the Standard calendar.

Exercise 4-5: Create two new base calendars to specify unique working schedules.

Exercise 4-6: Specify options settings for the project.

Exercise 4-7: Save the project.

After completing this module, students will be able to:

Define a new project using a six-step method.

Create a new base calendar.

Module 5: Project Task Planning

This module teaches the student all of the steps necessary to complete the task planning process, which is the first wave of the Planning process in the project management life cycle. Lessons

Understanding the Task Planning Process

Understanding Change Highlighting

Using Basic Task Planning Skills

Using Task Dependencies

Setting Task Constraints and Deadline Dates

Assigning Task Calendars

Understanding Duration-Based and Effort-Based Planning: Estimating Task Durations

Understanding Task Drivers

Creating Recurring Tasks

Lab : Project Task Planning

Exercise 5-1: Enter new tasks and edit an existing task.

Exercise 5-2: Rearrange the task list into a meaningful order.

Exercise 5-3: Insert a new task between two existing tasks.

Exercise 5-4: Delete an existing task.

Exercise 5-5: Create summary tasks and subtasks to show the WBS for the project.

Exercise 5-6: Create Milestone tasks.

Exercise 5-7: Add a Note and Cell Background Formatting to highlight a task of interest.

Exercise 5-8: Set each of the four types of task dependencies.

Exercise 5-9: Set Lag time and Lead time on task dependencies.

Exercise 5-10: Edit existing task dependencies using various methods.

Exercise 5-11: Set task dependencies in the class sample project.

Exercise 5-12: Set Constraints and Deadline dates on tasks.

Exercise 5-13: Assign a Task Calendar to a task.

Exercise 5-14: Estimate the Duration for several tasks.

Exercise 5-15: Determine the driver for any task using the Task Drivers tool.

Exercise 5-16: Create a Recurring Task.

After completing this module, students will be able to:

Understand all aspects of the task planning process.

Understand Change Highlighting.

Create and edit tasks.

Insert one or more new tasks between two existing tasks.

Delete an existing task.

Build the Work Breakdown Structure by creating summary tasks and subtasks.

Create Milestone tasks.

Add Notes and Cell Background Formatting to a task.

Understand how to use the four types of task dependencies, and add Lag time or Lead time as needed.

Edit an existing task dependency.

Set Constraints and Deadline dates on tasks.

Assign a Task Calendar to a task.

Estimate task Durations.

Use the Task Drivers tool to determine the driver for any task.

Create a Recurring Task.

Module 6: Project Resource Planning

This module teaches the student all of the steps necessary to complete the resource planning process, which is the second wave of the Planning process in the project management life cycle. Lessons

Defining Project Resources

Entering Basic Resource Information

Entering Custom Resource Information: Entering General Information; Changing Working Time; Setting an Alternate Working Schedule; Entering Nonworking Time; Setting Working Schedule Changes; Entering Cost Information; Entering Resource Notes; Using

the Custom Fields Page

Lab : Project Resource Planning

Exercise 6-1: Enter basic resource information for project team members.

Exercise 6-2: Enter general and working schedule information for project team members.

Exercise 6-3: Enter cost information and notes project team members.

After completing this module, students will be able to:

Explain the different types of resources available in Microsoft Office Project 2007.

Create Work, Material, and Generic resources.

Enter basic and custom resource information for project team members.

Module 7: Project Assignment Planning

This module teaches the student all of the steps necessary to complete the assignment planning process, which is the third and final wave of the Planning process in the project management life cycle. Lessons

Understanding Assignments

Using the Task Entry View

Understanding the Duration Equation

Setting the Cost Rate Table

Assigning Material Resources

Using Effort Driven Scheduling

Using the Assign Resources Dialog

Understanding Resource Overallocation

Leveling Overallocated Resources

Lab : Project Assignment Planning

Exercise 7-1: Assign resources to tasks using the Task Entry view.

Exercise 7-2: Learn about the Duration Equation by changing Units, Work, and Duration.

Exercise 7-3: Learn about Task Types by changing Units, Work, and Duration for various Task Types.

Exercise 7-4: Learn about the Programming Biases in Microsoft Office Project 2007 by changing the fixed variable in the Duration Equation for various Task Types.

Exercise 7-5: Specify an alternate Cost Rate for a resource assignment on a task.

Exercise 7-6: Assign a Material resource to a task.

Exercise 7-7: Use Effort Driven scheduling to shorten the Duration of a task.

Exercise 7-8: Learn more about Effort Driven scheduling by adding a resource to a task where the existing resource has completed some Actual Work on the task.

Exercise 7-9: Assign resources to a Recurring Task using the Assign Resources dialog.

Exercise 7-10: Use the Filtering features in the Assign Resources dialog to do skill matching between a Generic resource and available human resources.

Exercise 7-11: Use the resource substitution feature in the Assign Resources dialog to replace a Generic resource with a human resource.

Exercise 7-12: Locate resource overallocations and then level overallocated resources.

After completing this module, students will be able to:

Understand that the complete Microsoft Project Data Model includes task, resource, and assignment data.

Understand work estimation techniques.

Assign resources to tasks using the Task Entry view and the Assign Resources dialog.

Change the Cost Rate Table for an assignment.

Understand and use Task Types.

Use Effort-Driven scheduling to shorten task Duration.

Assign a Material resource to a task.

Use filtering and graphing in the Assign Resources dialog.

Locate and level resource overallocations.

Module 8: Project Execution

This module teaches the student how to view the Critical Path in a project, to baseline a project, and to track progress using one of three available tracking methods. Lessons

Understanding the Execution Process

Viewing the Critical Path

Working with Project Baselines: Saving a Project Baseline; Saving a "Rolling Baseline"; Saving Over a Previous Baseline; Viewing the Project Baseline; Clearing the Project Baseline; Using Additional Baselines

Tracking Project Progress: Entering % Complete; Entering Actual Work and Remaining Work; Using a Daily Timesheet

Rescheduling Uncompleted Work

Lab : Project Execution

Exercise 8-1: Use the Gantt Chart Wizard to view the Critical Path in a project.

Exercise 8-2: Save an original Baseline in a project.

Exercise 8-3: Save a duplicate copy of a Baselined project for later use a project closure.

Exercise 8-4: Enter task progress using the % Complete method.

Exercise 8-5: Enter task progress using the Actual Work and Remaining Work method.

Exercise 8-6: Enter task progress using the daily timesheet method.

Exercise 8-7: Enter a task Note to document additional task tracking information.

Exercise 8-8: Enter task progress on a Recurring Task.

Exercise 8-9: Reschedule uncompleted work from the past reporting period into the current reporting period.

After completing this module, students will be able to:

Understand each aspect of the Execution stage of the project management life cycle.

View the Critical Path for a project.

Save an original baseline for a project.

Understand the proper use of the multiple Baseline fields in Microsoft Office Project 2007.

Understand the three primary methods for entering project progress.

Reschedule uncompleted work from past reporting periods into the current reporting period.

Module 9: Variance Analysis

This module teaches the student how to analyze Work, Cost, Date, and schedule variance. This module also teaches the student to create custom Views, Tables, Filters, and Groups to further analyze variance and to view custom project information. Lessons

Understanding Variance: Understanding Variance Types; Understanding Actual vs. Estimated Variance

Analyzing Project Variance: Analyzing Date Variance; Analyzing Work Variance; Analyzing Cost Variance

Using Custom Views to Analyze Variance: What Is A View?; Creating a New Custom View

Creating a Custom Table

Creating a Custom Filter

Creating a Custom Group

Creating a New Custom View: Creating a Combination View

Using the Organizer

Lab : Variance Analysis

Exercise 9-1: Analyze schedule variance, along with Date, Work, and Cost variance.

Exercise 9-2: Create a new custom Table to show Duration variance.

Exercise 9-3: Create a new Table to show all project task variance in a single location.

Exercise 9-4: Create a new custom Filter that displays only Estimated Variance for Work (as opposed to Actual Variance).

Exercise 9-5: Create a custom Filter to locate tasks whose Duration exceeds their Baseline Duration.

Exercise 9-6: Create a new custom Group to group tasks by their Duration Variance in descending order in 1-day intervals.

Exercise 9-7: Create a custom View that shows all tasks whose Duration Variance is greater than 0 days, grouped by the Duration Variance field, and displayed with the Task Sheet screen.

Exercise 9-8: Create a new custom Tracking Gantt view that shows all five types of variance, and highlights tasks with estimated Work over budget.

Exercise 9-9: Use the Organizer tool to copy custom Views, Tables, Filters, and Groups from a project file to the Global.mpt file.

After completing this module, students will be able to:

Understand the different types of project variance.

Understand the difference between "estimated" variance and "actual" variance.

Analyze Work, Cost, Date, and schedule variance.

Create custom Views, Tables, Filters, and Groups.

Use the Organizer to manage custom Views, Tables, Filters, and Groups in Microsoft Office Project 2007.

Module 10: Plan Revision and Change Control

This module teaches the student how to revise a project to bring it back on track against its original goals and objectives, to manage changes to a project using a change control process, and to rebaseline a project after a major change control procedure. Lessons

Revising a Project Plan: Potential Problems with Revising a Plan

Using a Change Control Process

Inserting New Tasks in a Project

Rebaselining Your Project: Rebaselining the Entire Project; Backing Up an Original Baseline; Rebaselining Only Unstarted Tasks; Saving a Baseline for Selected Tasks

Viewing Multiple Baselines

Lab : Plan Revision and Change Control

Exercise 10-1: Revise a project by adding resources to Effort Driven tasks and by adjusting resource availability for project team members.

Exercise 10-2: Add a new task to a project using a Change Control process.

Exercise 10-3: Back up the original project baseline information in the Baseline1 set of fields.

Exercise 10-4: Rebaseline only the unstarted tasks in a project.

Exercise 10-5: View the new project Baseline after rebaselining a project.

Exercise 10-6: View alternate Baseline schedule information in a project.

After completing this module, students will be able to:

Define plan revision and change control.

Understand how to revise a project plan in Microsoft Office Project 2007.

Understand Baseline issues relating to change control.

Understand how the AutoLink feature works when you insert a new task in a project with dependencies.

Use change control procedures to add a new task to a project in Microsoft Office Project 2007.

Baseline a new task added through a change control procedure.

Module 11: Project Reporting

This module teaches the student report on all types of data in a Microsoft Office Project 2007 plan by printing Views, by printing default Reports, by creating and printing custom Reports, and by using the Visual Reports feature to export project information to Microsoft Office Excel

and Microsoft Office Visio.Lessons

Reporting in Microsoft Office Project 2007

Printing Views: Using Page Setup; Creating a Header or Footer; Using the Print Dialog

Printing Reports: Understanding Report and View Interaction

Understanding Report Definition

Creating Custom Reports: Creating Custom Monthly Calendar Reports; Creating Custom Crosstab Reports

Using Visual Reports: Viewing a Visual Report; Customizing a Microsoft Office Excel 2007 Visual Report; Customizing a Microsoft Office Visio 2007 Visual Report; Saving Local OLAP Cube Data

Creating Visual Report Templates: Editing Visual Report Templates; Managing Your Visual Report Templates

Lab : Project Reporting

Exercise 11-1: Use the Page Setup dialog to print a specific number of columns in a View.

Exercise 11-2: Use the Page Setup dialog to add a Notes page when printing the Gantt Chart view.

Exercise 11-3: Use the Page Setup dialog to create a custom Header for the Gantt Chart view.

Exercise 11-4: Use the Print dialog to print a selected date range for a View.

Exercise 11-5: Print Preview the various default Reports included in Microsoft Office Project 2007.

Exercise 11-6: Troubleshoot printing problems with the Cash Flow report.

Exercise 11-7: Troubleshoot printing problems with the Who Does What When report.

Exercise 11-8: View the definition of a Task Report and a Resource Report.

Exercise 11-9: Create a custom task Report based on the new Table and Filter used in a previously created custom View.

Exercise 11-10: Create a custom Monthly Calendar Report to show the tasks assigned to any resource.

Exercise 11-11: Create a monthly version of the Cash Flow report that displays both tasks and assignments.

Exercise 11-12: View Visual Reports in Microsoft Office Project 2007.

Exercise 11-13: Customize the PivotTable in a Visual Report in Microsoft Office Excel 2007.

Exercise 11-14: Customize the PivotChart in a Visual Report in Microsoft Office Excel 2007.

Exercise 11-15: Create the PivotTable and PivotChart sections of a new Visual Report Template.

Exercise 11-16: Format the PivotChart section of a new Visual Report Template.

After completing this module, students will be able to:

Understand reporting features in Microsoft Office Project 2007.

Print default and custom Views and Reports.

Create custom Reports.

View and modify Visual Reports.

Create custom Visual Reports.

Module 12: Project Closure

This module teaches the student how close out a completed project, to clean up and save a completed project as a template, and to compare the final completed project with the original baselined project using the Compare Projects tool in Microsoft Office Project 2007. Lessons

Project Closure

Using Project Closure Methodologies

Closing a Project: Cancelling Unnecessary Tasks; Marking Milestones as Complete

Saving a Completed Project as a Template: Creating a New Project from a Template

Using the Compare Project Versions Tool

Lab : Project Closure

Exercise 12-1: Cancel an unneeded task.

Exercise 12-2: Set the Remaining Work to 0 hours for a task that finished early and then mark all Milestone tasks complete to close a completed project.

Exercise 12-3: Clean up a completed project before saving it as a project template.

Exercise 12-4: Save a completed project file as a project template.

Exercise 12-5: Create a new project from the new project template saved in Exercise 12-4.

Exercise 12-6: Use the Compare Project Versions tool to compare the baselined and completed versions of a project.

After completing this module, students will be able to:

Understand and use project closure methodologies.

Close a completed project in Microsoft Office Project 2007.

Save a completed project as a project template.

Compare a completed project with the original project using the Compare Projects tool.