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MANAGING PROJECTS **2**

MICROSOFT OFFICE PROJECT SERVER 2007, MANAGING PROJECTS **14**

**COURSE 50268A: ESTABLISHING A PROJECT MANAGEMENT FOUNDATION
USING MICROSOFT OFFICE PROJECT 2007** **25**

Managing Projects

Course 5927A: Three days; Instructor-Led

Introduction

Elements of this syllabus are subject to change.

This three-day instructor-led course provides students with the knowledge and skills to build, maintain, and control well-formed project plans.

This is the first course in the Microsoft Office Project 2007 Official Curriculum series and will serve as the entry point for other Microsoft Official Curriculum (MOC) courses covering Microsoft Office Project 2007 and the Microsoft EPM 2007 Solution.

Audience

This course is intended for both novice and experienced project managers and schedulers. These individuals would be involved in or responsible for scheduling, estimating, coordinating, controlling, budgeting, and staffing of projects and supporting other users of MS Office Project. A familiarity with key project management concepts and terminology is recommended as well as basic Windows navigation skills.

At Course Completion

After completing this course, students will be able to:

- Get started with Microsoft Office Project 2007.
- Create and define projects.
- Work with estimates and dependencies
- Work with deadlines, constraints, and task calendars
- Work with resources.
- Predict behavior by using task types and the scheduling formula.
- Customize and format Microsoft Project views.
- Analyze resource utilization.
- Track progress.
- Create project reports which analyze project, resource, and task data.
- Manage multiple projects.

Prerequisites

- Experience using Microsoft Office Project to create project schedules.
- Fundamental knowledge of project management.
- Experience with the Microsoft Windows XP or Windows Vista™ operating system.
- Experience with Microsoft Office Excel 2003.

Course Outline

Module 1: Getting Started with Microsoft Office Project 2007

This module provides an overview of Microsoft Office Project 2007 and project management concepts. It explains how to use the desktop interface and how to work with various file types. It also illustrates how to receive help and advice while working with Office Project 2007.

Lessons

- Understanding the Nature of Projects
- Discovering Project 2007
- Understanding Project 2007 File Types
- Navigating the Project 2007 Interface
- Getting Help and Guidance
- Configuring Options

After completing this module, students will be able to:

- Describe the nature of projects.
- Demonstrate familiarity with Office Project 2007.
- Identify the different Office Project 2007 file types.
- Navigate the Office Project 2007 interface.
- Get help and guidance from within Office Project 2007.
- Understand configuration options.

Module 2: Creating and Defining Projects

This module explains how to create new projects, how to define appropriate options, and how to enter, organize, and outline the task list. It also explores ways to import data from other sources and provides guidance on configuring the corporate calendar.

Lessons

- Creating and Saving Projects
- Defining Properties and Options
- Creating and Organizing the Task List
- Importing Data
- Modifying and Applying Calendars
- Setting Scheduling Options

Lab 2: Creating and Defining Projects

- Entering Project and File Properties
- Setting Appropriate Schedule Options
- Setting Corporate Holidays
- Importing Data from Office Excel
- Update a Task List
- Creating a Multilevel Outline

After completing this module, students will be able to:

- Create and save projects.
- Define file properties and options.
- Create and organize the task list.
- Import data.
- Modify and apply calendars.
- Set schedule options.

Module 3: Working with Estimates and Dependencies

This module explains the techniques for estimating tasks and how to generate a dynamic schedule by creating dependencies between tasks. Various linking and unlinking techniques will be explored in multiple views and link types will be modified to reflect real-world scenarios.

Lessons

- Entering Task Estimates
- Using A PERT Analysis to Estimate Task Duration
- Linking and Unlinking Tasks by Using the Gantt Chart View
- Linking and Unlinking Tasks by Using the Network Diagram View
- Adding Lag or Lead Time to a Linked Task

Lab 3: Working with Estimates and Dependencies

- Entering a Duration or Work Estimate
- Creating Links Between Tasks
- Adding Lag or Lead Times
- Displaying Links in Network Diagram View

After completing this module, students will be able to:

- Enter task estimates.
- Use a PERT (Program Evaluation and Review Technique) analysis to estimate task durations.
- Link and unlink tasks by using the Gantt Chart view.
- Link and unlink tasks by using the Network Diagram view.
- Add Lag or Lead-time to a linked task.

Module 4: Working with Deadlines, Constraints, and Task Calendars

This module explains how to incorporate restrictions in a schedule through the use of deadlines and constraints. Displaying, reading, and analyzing the critical path will be discussed, along with how to use task drivers in the analysis. Task calendars will be presented as a technique to get a schedule back in line with a deadline or constraint.

Lessons

- Introducing Deadlines, Constraints, and Task Calendars
- Creating and Modifying Deadlines
- Creating and Modifying Constraints
- Creating and Modifying Task Calendars
- Identifying Critical Tasks
- Working with Task Driver

Lab 4: Working with Deadlines, Constraints, and Task Calendars

- Displaying the Critical Path
- Setting a Deadline
- Setting a Constraint
- Responding to Situations Triggered by Deadlines and Constraints
- Creating and Apply a Task Calendar to Meet a Deadline
- Finding and Removing Constraints in a Schedule

After completing this module, students will be able to:

- Introduce deadlines, constraints, and task calendars.
- Create and modify deadlines.
- Create and modify constraints.
- Create and modify task calendars.
- Identify critical tasks.
- Work with Task Drivers.

Module 5: Working With Resources

This module explains the various types of resources that are needed on a schedule, how to enter the resource list, and how to assign resources to tasks.

Changes to the project team will be implemented by modifying resource assignments. Various types of costs will also be covered including resource costs, task costs, and project budgets.

Lessons

- Introducing Resources, Assignments, and Budgeting
- Adding Resources to the Resource Sheet
- Creating and Modifying Resource Assignments
- Entering Project Budgets

Lab 5: Working with Resources

- Adding Resources to the Resource Sheet View
- Creating and Modifying Resource Assignments
- Entering Project Costs and Project Budgets

After completing this module, students will be able to:

- Describe resources, assignments, and budgeting.
- Add resources to the Resource Sheet view.
- Create and modify resource assignments.
- Understand the fundamentals of project budgets.

Module 6: Predicting Behavior by Using Task Types and the Scheduling Formula

This module explains the scheduling formula and how the variables duration, work, and units interact. It also illustrates how recalculations occur when variables are changed. This module explains recommended procedures on changing task types and changing variables for various situations.

Lessons

- Using Task Types and the Scheduling Formula
- Changing Variables and Predicting Behavior
- Applying Task Types to Produce Predictable Behavior
- Special Situations with Effort-Driven Scheduling

Lab 6: Understanding Task Types and the Scheduling Formula

- Identifying the Fixed Variable in a Task and How It Affects the Scheduling Formula
- Making Decisions about Task Type and Effort-Driven Settings
- Predicting the Scheduling Formula When Changing Variables

After completing this module, students will be able to:

- Use Task Types and the scheduling formula for effective calculations.
- Change variables and predict behavior.
- Apply task types to produce predictable behavior.
- Describe special situations within effort-driven scheduling.

Module 7: Customizing and Formatting

This module explains how to format text, bars, and other screen elements.

Custom objects will be created including templates, calendars, fields, tables, filters, groups, and views. This module also illustrates use of the Organizer to transfer custom objects to other files.

Lessons

- Formatting Screen Elements
- Creating and Modifying Templates
- Creating and Modifying Fields, Tables, and Formulas
- Creating and Modifying Filters and Groups
- Creating and Modifying Custom Views

Lab 7: Customizing and Formatting

- Modifying a Template to Include Corporate Standards
- Creating Simple and Complex Custom Fields
- Populating a New Table with Existing and Custom Fields
- Developing a New Filter And Group
- Moving an Object from a Project to the Global.mpp File

After completing this module, students will be able to:

- Format screen elements.
- Create and modify templates.
- Create and modify fields, tables, and formulas.
- Create and modify filters and groups.
- Create and modify custom views.

Module 8: Analyzing Resource Utilization

This module explains techniques for manipulating views to display resource allocation and how to identify causes of resource overallocation. Various options for managing limited resources will be explored. In addition, several techniques for solving overallocated resources will be explained, including the leveling feature.

Lessons

- Introducing Resource Utilization Concepts
- Viewing Resource Assignments, Allocation, and Utilization
- Managing Resource Availability
- Optimizing and Leveling Resource Assignments

Lab 8: Analyzing Resource Utilization

- Reading and Interpreting Resource Allocation Views
- Changing Resource Availability and Interpreting Results
- Identifying and Correcting Causes of Resource Overallocation

After completing this module, students will be able to:

- Describe resource utilization concepts.
- View resource assignments, allocation, and utilization.
- Manage resource availability.
- Optimize and level resource assignments.

Module 9: Tracking Progress

This module explains how to manage updates to a schedule by saving baselines and tracking duration, work, and cost updates. Comparison between expected and actual results will be illustrated with various views that display variance. In addition, this module provides guidelines on how to troubleshoot a schedule and how to get a troubled schedule back on track.

Lessons

- Working With Baselines
- Entering Duration Updates
- Entering Work Updates
- Entering Cost Updates
- Discovering Variances
- Troubleshooting and Getting Back on Track

Lab 9: Tracking Progress

- Setting and Revising a Baseline
- Entering Actual Results Updates for Tasks and Resources
- Controlling Projects by Finding Variance and Suggesting Corrective Action
- Applying Techniques to Shorten Duration, Reduce Work, and Reduce Cost

After completing this module, students will be able to:

- Work with baselines.
- Enter duration updates.
- Enter work updates.
- Enter cost updates.
- Discover variances.
- Trouble shoot schedules and get back on track.

Module 10: Creating Reports

This module explains how to configure views for printing and how to generate standard and Visual reports. Customizations to printouts and modifications to existing reports will also be covered. This module will explain how to export data and explore techniques for solving printing issues.

Lessons

- Selecting, Editing, and Creating Basic Reports
- Configuring Print and Page Setup Options
- Setting Options to Correct Printing Issues
- Exporting Reporting Data
- Creating and Modifying Visual Reports

Lab 10: Creating Reports

- Applying Solutions to Various Printing Scenarios
- Running Basic Reports That Summarize Data by Project, by Resource, by Task, or by Cost
- Developing a New Basic Report
- Exporting Data by Using a Custom Map to Merge with Data in an Existing Excel Spreadsheet
- Running Visual Reports That Summarize Data by Project, by Resource, by Task, or by Cost
- Developing a New Visual Report Template

After completing this module, students will be able to:

- Select, edit, and create standard reports.
- Configure print and page setup options.
- Set options to correct printing issues.
- Export project data.
- Create and modify visual reports.

Module 11: Managing Multiple Projects

This module explains how to create and manage multiple projects. It will cover links and the critical path across multiple projects. It also discusses how to create and use a shared resource pool and how to view resource allocation across multiple projects.

Lessons

- Introducing Management of Multiple Projects
- Creating Master Projects
- Creating Links Between Projects
- Calculating Single or Multiple Critical Paths
- Saving and Opening Multiple Projects
- Sharing Resources and Analyzing Resource Utilization Across Multiple Projects



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Lab 11: Managing Multiple Projects

- Inserting Subprojects into a Master Project
- Creating Links Across Projects and Managing Changes to Linked Tasks
- Displaying the Critical Path in a Master Project
- Creating and Sharing a Resource Pool
- Reading and Interpreting Resource Usage Across Multiple Projects

After completing this module, students will be able to:

- Introduce management of multiple projects.
- Create master projects.
- Create links between projects.
- Calculate single or multiple critical paths.
- Save and open multiple projects.
- Share resources and analyze resource utilization across multiple projects.

Microsoft Office Project Server 2007, Managing Projects

Course 5928A: Three days; Instructor-Led

Introduction

Elements of this syllabus are subject to change.

This three-day instructor-led course provides students with the knowledge and skills to initiate, plan, execute, monitor and control, and close enterprise projects by using the Microsoft Office Project Server 2007 enterprise tool.

This is the second course in the Microsoft Office Project 2007 Official Curriculum series and covers the Microsoft Enterprise Project Management (EPM) Solution.

Audience

This course is intended for experienced project managers and schedulers. These individuals are capable of managing projects in the Microsoft Office Project 2007 EPM environment, including project and non-project efforts, risks, issues, documents, task progress, and timesheets. These individuals should be familiar with key project management concepts and terminology found in the Project Management Institute's *A Guide to the Project Management Body of Knowledge (PMBOK Guide)*, Third Edition, and advanced knowledge and use of Microsoft Office Project 2007.

At course completion

After completing this course, students will be able to:

- Get started with Office Project Server 2007.
- Initiate projects.
- Understand the project planning processes.
- Plan projects through scope and schedule management.
- Plan projects through staffing management plans.
- Plan resource assignments for projects.
- Plan projects through cost, risk, and other planning documents.
- Execute projects through processes, resources, and deliverables.
- Execute projects by managing timesheets and personal settings.
- Monitor and control projects by tracking task and project progress.
- Monitor and control projects through measuring project performance and reporting progress.
- Close projects.

Prerequisites

Before attending this course, students must have:

- Experience using Microsoft Office Project to create project schedules
- Fundamental knowledge of project management
- Experience with the Windows XP or Windows Vista operating system
- Experience with Microsoft Office Excel 2003
- Familiarity with the key project management concepts and terminology found in the Project Management Institute's *PMBOK Guide*, Third Edition

In addition, it is recommended, but not required, that students have completed:

- Course 5927: Microsoft Office Project 2007, Managing Project

Course outline

Module 1: Getting Started with Office Project Server 2007

This module provides insight into the new features and benefits of Microsoft Office Project Server 2007 that are designed to meet enterprise project management (EPM) requirements. Additionally, it explains how to differentiate user interactions and interfaces in Microsoft Project Web Access and how to work with Office Project Server 2007 from Microsoft Office Project Professional 2007.

Lessons

- Describing the Enterprise Project Management Context
- Discovering Office Project Server 2007
- Differentiating the Users of Office Project Server 2007
- Working with Office Project Professional 2007 and Office Project Server 2007

Lab: Creating and Saving a New Project in Office Project Server 2007

- Connecting to Office Project Server 2007
- Creating a New Project in Office Project Server 2007
- Saving a New Project in Office Project Server 2007

After completing this module, students will be able to:

- Describe the enterprise project management context.
- Describe Office Project Server 2007.
- Identify the users of Office Project Server 2007.
- Work with Office Project Professional 2007 within Office Project Server 2007.

Module 2: Initiating Projects

Effectively managing the initiating processes includes setting up a central location to store potential and approved projects. In this module, students will become familiar with the project management initiating processes. They will initiate projects in Office Project Professional 2007 and Office Project Web Access through Office Project Server 2007. Finally, this module will illustrate how they can use Office Project Web Access to centrally store and manage project documents.

Lessons

- Understanding Initiating Processes
- Differentiating the Initiating Processes in Project Professional 2007 and Project Web Access
- Managing Initiating Processes by Using Project Web Access
- Managing Documents in Office Project Web Access

Lab: Initiating Projects and Working with Document Files

- Creating an Activity Plan
- Building a Resource Plan
- Creating a Project Workspace
- Managing Documents

After completing this module, students will be able to:

- Describe the project management initiation processes.
- Differentiate the initiating processes between Office Project Professional 2007 and Office Project Web Access.
- Create and manage proposals, activity plans, and resource plans.
- Manage documents in Project Web Access 2007

Module 3: Planning Projects—Context and Framework

This module describes the project management plan and then explains how students can effectively use Office Project Web Access and Office Project Professional 2007 to connect to Office Project Server 2007 in their planning processes.

Lessons

- Understanding the Project Management Plan
- Differentiating the Office Project Server 2007 Client Software

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After completing this module, students will be able to:

- Describe the project management plan.
- Compare the uses of Office Project Web Access and Office Project 2007 in the planning processes.

Module 4: Planning Projects—Scope and Schedule Management

This module explains the scope management plan and the schedule management plan and describes how students can implement these two plans with Office Project Server 2007.

Lessons

- Developing Components of the Scope Management and Schedule Management Plans
- Working with Deliverables

Lab: Working with Tasks, Milestones, and Deliverables

- Entering WBS, Tasks, and Milestones
- Creating the Project Schedule
- Creating Project Deliverables
- Managing Dependencies on Deliverables

After completing this module, students will be able to:

- Establish the scope management and schedule management plans.
- Work with deliverables.

Module 5: Planning Projects—Staffing Management Plan

This module describes the concept of a staffing management plan and how students can implement that plan by using Office Project Server 2007 for different types of organizational structures. This module also identifies the other types of resources available for project teams along with how to manage an organization's overall resource capacity in Office Project Server 2007.

Lessons

- Building a Project Team
- Managing Resource Availability

Lab: Managing Enterprise Resources

- Building the Project Team

After completing this module, students will be able to:

- Build a project team
- Manage resource availability.

Module 6: Planning Projects—Resource Assignments

This module explains the new concepts and processes that are involved in the assignment cycle and shows how to resolve enterprise resource overallocations.

Lessons

- Understanding the Assignment Cycle
- Resolving Resource Overallocation



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Lab: Working with Assignments

- Assigning Resources
- Self-Assigning to a Team Task
- Reassigning Assignments
- Leveling Overallocation with Enterprise Resources

After completing this module, students will be able to:

- Describe the assignment cycle
- Resolve resource overallocation

Module 7: Planning Projects—Cost, Risk, and Other Management Plans

This module begins by describing the concept and implementation of a cost management plan in Office Project Server 2007. Students will learn about the risk management plan and how Office Project Server 2007 supports their need to deal with project risk factors. Additionally, other types of management plans are explained in the context of how they are supported by Office Project Server 2007.

Lessons

- Developing Components of the Cost Management Plan
- Developing Components of the Risk Management Plan
- Linking Planning Documents and Using the Team Discussion Feature

Lab: Planning Projects—Cost, Risks, Issues, and Other Planning Documents

- Entering Costs for Resources
- Customizing Risk Items
- Customizing Issue Items
- Uploading Project Documents to the Project Workspace

After completing this module, students will be able to:

- Develop components of the cost management plan.
- Develop components of the risk management plan.
- Link planning documents and use the Team Discussion feature.

Module 8: Executing Projects—Processes, Resources, and Deliverables

In this module, students will learn how Office Project Server 2007 facilitates and expedites the execution of the project management plan through resource assignment, team building, and project deliverable management.

Lessons

- Understanding Executing Processes
- Managing Resources and Deliverables

Lab: Modifying the Project Team and Managing Deliverables

- Modifying the Project Team and Managing Deliverables
- Managing Deliverables

After completing this module, students will be able to:

- Describe the executing processes.
- Manage the executing processes by working with various resources

Module 9: Executing Projects—Managing Timesheets and Personal Settings

In this module, students will work with timesheets in the team member, resource manager, and project manager roles. They will learn how administrative time is captured. Finally, they will configure Office Project Web Access to provide personal alerts and reminders to help them keep track of project activities.

Lessons

- Working with Timesheets
- Reporting Administrative Time
- Configuring Personal Settings

Lab: Using Timesheets and Reporting Administrative Time

- Using Timesheets
- Reporting Non-Project Work

After completing this module, students will be able to:

- Work with timesheets.
- Report administrative time.
- Configure personal settings.

Module 10: Monitoring and Controlling Projects—Tracking Task and Project Progress

In this module students will track task progress and updates in Office Project 2007 and Office Project Web Access 2007. They will also use the Office Outlook 2007 integration as an alternative method to track task progress and submit updates.

Lessons

- Understanding the Monitoring and Controlling Processes
- Working with Task Progress and Updates in Project Web Access
- Working with Task Progress by Using Office Project 2007
- Tracking and Viewing Task Information by Using Outlook 2007

Lab: Tracking Task Progress

- Tracking Task Progress by Using Office Project 2007
- Tracking Task Progress by Using Office Project Web Access

After completing this module, students will be able to:

- Describe the monitoring and controlling processes.
- Work with task progress and updates by using Office Project Web Access.
- Work with task progress and updates by using Office Project 2007.
- Track and view task information by using Office Outlook 2007.

Module 11: Monitoring and Controlling Projects—Measuring Performance and Reporting Progress

Office Project Web Access provides features that help the project manager make informed decisions. In this module students will learn about status reports and their functions, and they will review performance metrics and progress reports.

Lessons

- Understanding Status Reports
- Reviewing Performance Metrics and Progress Reports

Lab: Preparing Status Reports and Analyzing Progress Reports

- Preparing a Status Report
- Analyzing Project Progress in Project Center Views
- Analyzing Project Progress in Project Report Center

After completing this module, students will be able to:

- Describe status reports and their function.
- Review performance metrics and progress reports.



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Module 12: Closing Projects

Office Project Server 2007 can also help with the management of closing activities and the storage and disposal of project information. In this module, students will learn about the Closing process and the support provided for it by Office Project Server 2007.

Lessons

- Understanding the Closing Process
- Supporting The Closing Process

Lab: Creating and Saving an Enterprise Template

- Creating and Saving an Enterprise Template

After completing this module, students will be able to:

- Describe the closing process.
- Support the closing process with Office Project 2007

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

Course Outline

Module 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 Overview

This 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.